

**From:** Corbett, Krysti  
**Location:** Ex. 6 - Personal Privacy **Code:** Ex. 6 - Personal Privacy  
**Importance:** Normal  
**Subject:** Union Briefing on VERA VSIP Current Status  
**Start Date/Time:** Mon 7/24/2017 6:00:00 PM  
**End Date/Time:** Mon 7/24/2017 7:00:00 PM

**From:** Westenberger, Andrea  
**Location:** Ex. 6 - Personal Privacy  
**Importance:** Normal  
**Subject:** ARA-OARM Call  
**Start Date/Time:** Tue 7/18/2017 3:30:00 PM  
**End Date/Time:** Tue 7/18/2017 4:30:00 PM

## ARA-OARM Call

Tuesday, 7/18, 8:30 am – 9:30 PST

Ex. 6 - Personal Privacy

*Note: To reduce costs, please call the Ex. 6 - Personal Privacy number in groups as we are charged per line/per minute.*

[Join Skype Meeting](#)

For questions or agenda items, please contact Andrea Westenberger, Lynnnann Hitchens, and Michael Hardy.

Topic #	Topic Title	Materials	Presenter(s)/Office	Time (PST)
1	<b>Roll Call</b>		Andrea Westenberger (R10)	8:30-8:35
2	<b>EMS</b> • <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Ex. 5 - Deliberative Process <b>Ex. 5 - Deliberative Process</b>		Andrea Westenberger (R10)  Nancy Lindsay (R10)	8:35-8:40
3	<b>Ex. 5 - Deliberative Process</b>		Wes Carpenter (OARM-OHR)	8:40-8:50
4	<b>Performance Improvement Plan (sent by Donna Vizian on 7/12)</b>		Wes Carpenter (OARM-OHR)	8:50-9:00
5	<b>Ex. 5 - Deliberative Process</b>		Loretta Hunt (OARM-OHR)	9:00-9:10

6	<b>VERA/VSIP</b>		Loretta Hunt (OARM-OHR)	9:10-9:20
7	<b>EAP Update</b>		Wes Carpenter (OARM-OHR)	9:20-9:30
			Loretta Hunt (OARM-OHR)	

**From:** Hart, Debbi  
**Location:** Teleconference - 5340 WJCN  
**Importance:** Normal  
**Subject:** Update on VERA/VSIP  
**Start Date/Time:** Thur 6/15/2017 5:00:00 PM  
**End Date/Time:** Thur 6/15/2017 5:30:00 PM

Teleconference Call in Ex. 6 - Personal Privacy Code: Ex. 6 - Personal Privacy



**From:** Vizian, Donna  
**Location:** DCRoomARN3330/DC-AR-OARM  
**Importance:** Normal  
**Subject:** VERA/VSIP  
**Start Date/Time:** Wed 6/14/2017 3:00:00 PM  
**End Date/Time:** Wed 6/14/2017 3:30:00 PM

Meeting requested by Ms. Vizian. 13 Jun/1700/mag

Teleconference Number: [Ex. 6 - Personal Privacy] / Conference Code: [Ex. 6 - Personal Privacy]

## Appointment

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**From:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Sent:** 5/22/2017 8:25:26 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** review V/V  
**Location:** Linda's office  
**Start:** 5/23/2017 7:00:00 PM  
**End:** 5/23/2017 7:30:00 PM  
**Show Time As:** Busy

Lauren and I want to review your V/V materials against the roster, and we have a few questions.  
Thanks,

Lynnann

**From:** Westenberger, Andrea  
**Location:** Ex. 6 - Personal Privacy  
**Importance:** Normal  
**Subject:** VERA/VSIP meeting w/ OARM, ARAs, and HROs  
**Start Date/Time:** Tue 5/9/2017 4:00:00 PM  
**End Date/Time:** Tue 5/9/2017 4:30:00 PM  
EPA Workforce Reshaping Information

# VERA/VSIP meeting w/ OARM, ARAs, and HROs

Tuesday, 5/9, 9:00 am – 9:30 PT

Ex. 6 - Personal Privacy

*Note: To reduce costs, please call the Ex. 6 - Personal Privacy number in groups as we are charged per line/per minute.*

## Logistics Note

**The ARAs have a conf. call with OCFO from 8:30 – 9:00 PT. Once the meeting with OCFO concludes, we will move on to the VERA/VSIP meeting. Please join at 9:00, but be aware that the OCFO topics might run over a few min into the OARM call.**

Invitees

OARM, ARAs, and HROs, (Deputy ARAs are invited but optional)

## Purpose

- A. 5 min: Grants Review – quick preview from Denise Polk and Kerry Neal (OARM-OGD).
- B. 25 min: Discuss VERA/VSIP process questions as a group.

## Discussion questions

**If you have more questions, please send to Andrea Westenberger**

# **Ex. 5 - Deliberative Process**

## **Reference**

Donna Vizian's 4/17/17 EPA Workforce Reshaping email (attached)

# **Guide to Voluntary Early Retirement Regulations**



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## **1. The Purpose of VERA**

The Voluntary Early Retirement Authority (VERA) provides agencies the option to offer voluntary early retirement when restructuring as well as when downsizing. The voluntary early retirement provisions are the same under the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS).

The use of VERA is an option for increasing voluntary attrition in agencies that are undergoing substantial organizational change (e.g., reduction in force, reorganization, reshaping, delayering). Besides providing an incentive for employees to voluntarily retire or resign to avoid potential reduction in force actions, the agency may also offer VERA to employees in safe positions that could then provide placement opportunities for employees occupying surplus positions.

- VERA is not the same as a Voluntary Separation Incentive Payment (VSIP), also called a “buyout.” The Office of Personnel Management’s (OPM) approval of VERA for an agency does not automatically authorize Voluntary Separation Incentive Payments. However, the use of VERA and VSIP together has been shown to significantly increase the acceptance rate for voluntary separations by VERA, optional retirement, or resignation.
- VERA is not the same as Discontinued Service Retirement (DSR). Although the annuity computation formulas and the minimum age and service requirements are the same, DSR is an involuntary action, while VERA is a voluntary action. DSR may not be used in combination with VSIP, which requires a voluntary separation.

## **2. Statutory Basis for VERA Regulations**

Section 1313(b) of the Chief Human Capital Officers Act of 2002 (Public Law 107-296, approved November 25, 2002) authorizes the VERA option under OPM’s regulations, as codified in title 5, United States Code (U.S.C.).

- (1) 5 U.S.C. 8336(d)(2) includes the statutory VERA provisions for employees covered by the Civil Service Retirement System.
- (2) 5 U.S.C. 8414(b)(1)(B) includes the statutory VERA provisions for employees covered by the Federal Employees Retirement System.

### 3. VERA Regulations

OPM implements the statutory VERA requirements through regulations published in title 5, Code of Federal Regulations (CFR).

- (1) 5 CFR 831.114 covers VERA for employees covered by the Civil Service Retirement System (CSRS).
- (2) 5 CFR 842.213 covers VERA for employees covered by the Federal Employees Retirement System (FERS).
  - On June 15, 2004, OPM published 5 CFR parts 831 and 842 in the Federal Register at 69 FR 33277, which contain the final VERA regulations (effective on the date of publication).
  - The National Archives and Records Administration (NARA) provides a copy of current VERA regulations at <http://www.ecfr.gov>.
  - VERA regulations do not apply to the Department of Defense (DoD). Public Law 108-136, approved November 24, 2003, gives DoD permanent agency-specific VERA and VSIP authority.

#### (3) **Agency Planning for Submitting a VERA Request to OPM**

The agency has the right to request VERA from OPM, and to make other decisions concerning how and when to use an approved VERA. Before requesting VERA from OPM, the agency should consider how VERA would assist the agency in reaching a specific goal. For example, the goal could be direct savings by the voluntary reduction of a specific number of positions. Or, the goal could be a voluntary reduction of employees in positions with obsolete skills and the establishment of new positions with different skills.

These planning goals will also help the agency develop the data needed to submit a formal request for the VERA option. Without clear staffing goals, the agency could find, after offering VERA, that too many employees retired, hindering the agency's abilities to perform its essential missions. This is why an agency should not request VERA as a first option if the agency finds itself facing



what could be a temporary situation, such as a short-term reduction in available appropriations.

If the agency receives a VERA authority, the defined goals will assist the agency in monitoring the authority and, if necessary, to adjust the option while it is underway (for example, to close the VERA option after reaching the agency's workforce targets).

The agency should begin planning for VERA as soon as it appears the agency has a need for early retirement. This ensures that the agency has VERA available in time for both the agency and its employees to make the most effective use of the option. At the activity or subagency level, the organization should recognize that some lead time is required to develop the data to support the VERA request, to submit the VERA request to the agency's headquarters, and then for the headquarters to formally request OPM approval of the VERA. At each level the activity may be asked to clarify the VERA request, or develop additional data.

Also, to ensure that there are no agency delays in planning for VERA offers, an agency with bargaining unit employees should review existing labor agreement(s) and consider whether it has any collective bargaining obligations. The agency should follow any applicable procedures contained in the labor agreement. If, however, an agency finds it has bargaining obligations, it should plan for early negotiations.

In addition, to maximize the benefit of VERA, the agency should allot sufficient time for key matters such as developing activity or subagency policy on the coverage and application of the authority, preparing the human resources staff, counseling employees, holding retirement seminars, computing annuities for those considering retirement, etc. VERA often results in an additional major workload for an agency's personnel staff. For example, the agency must inform eligible employees of the VERA opportunity. The agency must also advise interested employees on the amount of their annuity and related items. This process requires additional time and staff when eligible employees are widely dispersed and/or do not have access to a local personnel office.

Once OPM receives an agency's VERA request, OPM promptly reviews the package to verify that the request is consistent with the controlling statutory and regulatory requirements.

While the VERA request is pending approval at higher levels of the agency or at OPM, the agency should continue planning how the agency will use the option. The agency should also monitor whether any of the assumptions that serve as the basis for the VERA request have changed.

## **5. Competitive Sourcing Situations**

An agency that is undergoing a competitive sourcing study and anticipates the need for restructuring or workforce reduction to implement the outcome of the study (e.g., contracting out work or establishing a Most Efficient Organization) may initiate a request for VERA authority before the study is completed. Because of the detailed requirements related to a competitive sourcing study and the need for strict confidentiality in the process, it is difficult for the agency to forecast either the outcome of the study or the effects of the study on the agency's workforce. As a result, an agency may not be able to furnish the kind of specific data about the positions that may be covered by a VERA. In this situation, the agency should submit a request to OPM projecting possible outcomes, presenting "if-then" scenarios for either (1) retaining the function; or (2) contracting out. OPM may provide the agency with contingent approval for the VERA option (i.e., the agency's need for VERA would be subject to the outcome of the competitive sourcing study).

Before extending VERA offers to employees, the agency must first notify OPM of the outcome of the competitions. If the competitive sourcing decision will result in the agency contracting the function, OPM will authorize immediate use of the VERA. If the competitive sourcing decision is to retain the function in the agency, the agency must provide OPM with updated information to support the VERA.

Contingent approval benefits agencies because it:

- Provides for early review of the agency's VERA request by OPM;
- Enables both the agency and OPM to respond quickly to a decision on the agency's VERA request when the competitive sourcing study is completed;
- Helps the agency retain skilled workers and maintain productivity in a competitive sourcing situation; and
- Allows the agency to demonstrate positive efforts to assist employees who may be negatively affected by the results of the competitive sourcing study.

## **6. Agency VERA Decisions**

An agency may:

- (1) Request VERA from OPM;

- (2) Decide whether to use an approved VERA;
- (3) Decide which employees are covered by VERA;
- (4) Establish the VERA window period; and,
- (5) Determine the number of employees who may retire under the VERA.

## **7. VERA Request From Agency Headquarters**

An agency's request to OPM for VERA must be signed by:

The head of the agency, or a specific designee (i.e., a senior officer or official within an agency who has been specifically designated to sign requests for VERA under a designation from the head of the agency).

The agency should send its VERA request to OPM at:

Deputy Associate Director  
Recruitment and Hiring  
U.S. Office of Personnel Management  
1900 E Street, NW.  
Room 6500  
Washington, DC 20415

To expedite processing of the VERA, the agency may email or fax its VERA request to 202-606-4430.

For additional guidance on VERA, the agency should contact OPM's Recruitment and Hiring (202-606-0203).

For more information, refer to the checklist for VERA requests in Section 25.

## **8. Information in VERA Request to OPM**

The agency's request to OPM for VERA approval must contain the following information:

- (1) Identification of the agency or specified component(s) covered by VERA;

- The most important item for an agency to consider in maximizing the positive benefits of VERA is the agency's ability to accurately target the positions covered by the option. For example, to minimize the disruption of a reduction in force, the agency could target VERA for positions where (1) the incumbent is a displaced employee, or (2) an employee in a continuing position may retire early, allowing the agency to place an employee who would otherwise be involuntarily separated in the vacant position.

The agency planning for a substantial reduction in force or other restructuring action should not open a VERA window to all eligible employees with the goal of counting the remaining staff after the window closes to see if any critical positions are now vacant. The "shotgun" use of VERA may complicate (rather than minimize) staffing shortages resulting from any organizational change. The final result may even hamper the agency's immediate ability to carry out its mission.

(2) Reasons why the agency needs VERA;

- In its reasons for requesting VERA, the agency must include a detailed summary of the agency's personnel and/or budgetary situation that will result in an excess of personnel because of a substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping. Also, the agency's reasons for VERA must be consistent with its human capital goals.

If the agency requests agencywide VERA, the agency must summarize how its plans for organizational change will affect all its employees and components. However, the overall summary to OPM in support of agencywide VERA does not have to identify each location, organization, or group of employees that would be covered by the VERA.

After OPM approves an agency's request to offer VERA agencywide, the agency has the right to restrict coverage of the authority. OPM's approval letter to the agency covers the agency's right to manage its VERA.

For example, with an agencywide VERA the agency may offer early retirement to all its employees. At its option, the agency may limit VERA offers to employees on the basis of location, organizational unit, occupational series, grade, and/or any similar nonpersonal and objective factor. The agency may also offer VERA during a single window period, or during multiple window periods.

An agency may request OPM contingent approval of a VERA request that is based upon a pending competitive sourcing study. Since the agency will not have complete information until completion of the study, for contingent approval of VERA the agency should submit information based upon a worst case situation affecting the positions covered by the VERA request. The agency will subsequently provide OPM with updated information when it finalizes the competitive sourcing decision.

- (3) The date(s) on which the agency expects to implement the substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping;
- (4) The time period(s) during which the agency plans to offer VERA;
- (5) The total number of non-temporary employees in the agency or specified component(s) covered by the VERA;
- (6) The total number of non-temporary employees in the agency or specified component(s) covered by the VERA who, without the VERA option, will be involuntarily separated, downgraded, transferred, or reassigned as a result of the substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping;
- (7) The total number of non-temporary employees in the agency or specified component(s) covered by the VERA who are eligible for voluntary early retirement;
- (8) An estimate of the total number of non-temporary employees in the agency or specified component(s) covered by the request for VERA who are expected to actually retire during the period covered by the request for VERA;
  - A critical step for the agency in evaluating the effectiveness of a potential VERA is to first determine the number of employees eligible for VERA, estimate the number of employees who may actually retire early, and then assess the results of allowing these employees to retire by VERA (e.g., savings from a net reduction in personnel, positions available to restaff with different skills, placement opportunities for displaced employees). In projecting savings or attrition from VERA, the agency should not assume that all or even most of the employees eligible for VERA will actually retire. However, when using VERA in conjunction with VSIP, most agencies can expect a higher acceptance rate of the VERA option.

- (9) A description of the types of personnel actions that the agency anticipates may be necessary as a result of the agency's need for VERA.

Examples of personnel actions include separations, transfers, reassignments, and downgradings.

## **9. Basis for OPM Approval of VERA Request**

OPM may approve an agency's VERA request if OPM determines that the agency (or a component) meets the following conditions:

- (1) The agency is undergoing substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring; and
- (2) A significant percentage of the agency's employees are likely to be involuntarily separated or demoted because of one or more of the reasons in (i) above, or the agency has identified employees in positions that are becoming surplus or excess to the agency's future ability to effectively carry out its mission.

OPM may require an agency to forward overdue interim and final reports on a previous VERA before OPM approves a new VERA for the agency. OPM's approval letter to the agency contains the VERA reporting requirements.

## **10. OPM Evaluation of VERA Request**

OPM will evaluate an agency's VERA request based upon:

- (1) A specific request from the agency for the VERA option;
- (2) A VSIP implementation plan, which must outline the agency's intended use of both VERA and VSIP; or
- (3) The agency's human capital plan, which must outline its intended use of both VERA and VSIP, and the changes in organizational structure that the agency expects to make as the result of projected separations for both VERA and VSIP.

Regardless of the method used, the agency's VERA request must include all of the information covered in Section 8 above.

## **11. Maximum Time Period for VERA Option**

OPM may approve an agency's VERA request to be effective through:

- (1) The entire period of the agency's substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping; or
- (2) The initial portion of the period covered in subparagraph (1) with a requirement for subsequent information and justification if the period covers multiple years.

## **12. General Eligibility for VERA**

To be eligible to retire under VERA, an employee must:

- (1) Meet the VERA minimum age and service requirements (i.e., the employee has completed at least 20 years of creditable service and is at least age 50, or has completed at least 25 years of creditable service regardless of age);
  - The minimum age and service requirements are set by statute in 5 U.S.C. 8336(d)(2) for CSRS employees, and in 5 U.S.C. 8414(b)(1) for FERS employees. OPM has no authority to waive either the minimum age or service requirement for VERA eligibility.
- (2) Have been continuously employed by the agency for at least 31 days before the date that the agency initially requested OPM approval of VERA;
- (3) Hold a position that is not a time-limited appointment;
- (4) Have not received a final removal decision based upon misconduct, or unacceptable performance;
- (5) Hold a position covered by the agency's VERA; and
- (6) Retire under the VERA option during the agency's VERA window.

### **13. Employees on Active Duty in the Armed Forces**

An employee on active duty in the Armed Forces who would otherwise be eligible for a VERA offer will have 30 days following restoration to the agency to accept or reject the agency's offer of VERA.

The restored employee has the right to accept or reject the agency's offer of VERA even if the authority approved by OPM has expired.

### **14. Use of Annual Leave to Reach Initial Eligibility for an Immediate Annuity**

An employee has the right to use accrued annual leave and remain on the agency's rolls past the effective date of reduction in force separation in order to:

- (1) Gain title to an immediate annuity; and/or
- (2) Continue health benefits coverage into retirement.

An employee who will be separated by adverse action after declining geographic relocation to a position in a different local commuting area has the same right to use annual leave to reach initial eligibility to an immediate annuity; and/or continuation of health benefits participation into retirement.

The agency may not retain the employee past the date the employee first becomes eligible for an immediate annuity, and/or continuation of health benefits into retirement. When applicable, the agency must retain the employee long enough to meet the initial eligibility requirements for both an immediate annuity and continuation of health benefits into retirement.

An employee is required to have enough annual leave to cover any part of the day on which the employee establishes eligibility for benefits under the authorizing statute. For example, an employee needs 30 workdays of annual leave to reach first eligibility for voluntary early retirement, but the employee has accumulated annual leave that only covers 29 workdays and one hour on the 30th day. The employee has enough leave to establish title to an immediate annuity because the one hour of annual leave covers part of the 30th day (i.e., the day eligibility is established).

There is no language in either the authorizing statute or in regulations that provides an employee with the right to always choose between VERA or discontinued service retirement. The law simply provides that the displaced



employee has the right to use annual leave to gain title to an immediate annuity. This means that an agency may properly limit a displaced employee to a discontinued service retirement, rather than VERA, as the basis to establish initial eligibility for an immediate annuity.

## **15. VERA Offers Must Be Consistent With OPM-Approved Authority**

An agency may offer VERA only as authorized in the agency-specific authority approved by OPM.

An agency may not offer or process VERA actions beyond the expiration date stated in the VERA approved by OPM.

An agency may not offer VERA to employees not covered in the VERA approved by OPM.

## **16. Organizational Basis for VERA Offers**

An agency may offer VERA only on the basis of organizational considerations such as one or more of the following nonpersonal factors:

- (1) Organizational unit(s);
- (2) Classification series, occupations, and/or grade levels;
- (3) Geographical location(s);
- (4) Specific VERA window(s);
- (5) Skills, knowledge, or other factors related to a position; or
- (6) Any combination of the five factors in subparagraphs (i) through (v) above that the agency determines to be appropriate and necessary to implement the agency's VERA.

## **17. Selecting Employees for VERA**

After an agency opens a window for a VERA, the agency may limit VERA offers by:

- (1) An established opening and closing dates that the agency announces to employees at the time of the initial VERA offer; or
- (2) Receipt of a specified number of applications for VERA, provided that, at the time of the initial offer, the agency notified employees of its right to limit retirements on that basis.

If the agency finds that the situation justifying the VERA has changed, at its option the agency may subsequently establish a revised closing date for the VERA window. The agency may also decrease or increase the number of VERA applications it will accept. Both the amended VERA closing date and revised number of VERA applications must be covered by the VERA authority approved by OPM.

If the agency revises the closing date of its VERA window and/or revises the number of VERA applications it will accept from eligible employees, the agency must announce the new VERA closing date and/or ceiling on VERA applications to the same group of employees included in the agency's original VERA announcement. The agency may also offer the revised VERA to a different group of employees who are covered by the VERA approved by OPM.

If the agency plans to terminate the VERA window before the original planned expiration date, the agency should consider allowing eligible employees to change the effective date of their VERA retirements to precede the new expiration date of the window.

## **18. Additional Options to Select Employees for VERA**

- (1) At its option, the agency may administratively implement a fair and objective procedure to determine which employees may separate for a VERA when more employees apply for a VERA than the agency can accommodate.
- (2) As another option, the agency may administratively implement a policy that stipulates when and under what circumstances employees will be allowed to withdraw their VERA application. The policy may specify that:
  - (a) Employees will be allowed to subsequently decline separating by VERA even after signing the applicable forms;

- (b) Employees will not be allowed to subsequently decline separating by VERA after signing the applicable forms; or
- (c) The decision to allow an employee to subsequently decline separating by VERA after signing the applicable forms will be made on a case by case basis for a reason such as hardship.

## **19. Waiver of the Usual Participation Requirement to Continue Health Benefits into Retirement**

An agency offering VERA or VSIP may be covered by a waiver of the usual participation requirement to continue health benefits into retirement.

To continue Federal health insurance into retirement, employees must generally meet a requirement of being enrolled in the Federal Employees Health Benefits Program for at least 5 years prior to retirement, or since their first opportunity to enroll. Otherwise, the employee must request that OPM waive the 5-year participation requirement.

The agency's benefits officer can assist employees in requesting a waiver from OPM. The benefits officer can also determine if an employee who is retiring from an agency with current VERA or VSIP authority is eligible for a blanket waiver of the 5-year participation requirement under Benefits Administration Letter (BAL) 04-208, dated September 8, 2004.

BAL 04-208 covers "Federal Employees Health Benefits Program: Participation Requirements for Employees Retiring During a Period of Voluntary Separation Incentive Payments or Voluntary Early Retirement Authority." BAL 04-208 explains OPM's policy on waivers of the usual participation requirements for employees who retire during a period during which their agency has statutory authority to offer VERA or VSIP.

BAL 04-208 is available from OPM's website at [www.opm.gov](http://www.opm.gov).

## **20. Ensuring that VERA Retirements are Voluntary**

The agency is responsible for ensuring that employees are not coerced into retiring under a VERA, or that the employee's decision to retire under the VERA was not based on erroneous or misleading information.

When announcing an opportunity to retire under a VERA, the agency should inform its employees that VERA is a voluntary action by the employee. If the agency finds that an employee was coerced into VERA retirement, the agency has the responsibility to take appropriate corrective action. An employee who retires under VERA, but who believes that the retirement was involuntary, may appeal the basis for the retirement to the Merit Systems Protection Board.

## **21. Processing VERA Retirements**

Chapter 30 of the "Guide to Processing Personnel Actions" contains instructions for agencies to process personnel actions for employees who retire under VERA.

The Guide is available on OPM's website at [www.opm.gov](http://www.opm.gov).

OPM's letter to the agency approving the VERA option also contains the Nature of Action Codes used to document VERA retirements.

Chapter 43 of the "CSRS and FERS Handbook" also contains information used by agencies to process employees' applications for VERA.

The Handbook is available on OPM's website at [www.opm.gov](http://www.opm.gov).

## **22. Agency Management of VERA**

After OPM approves a VERA, the agency is required to notify OPM immediately if there are any subsequent changes in the conditions that served as the basis for OPM approving the VERA.

In addition to a VERA approval letter, OPM also provides the agency with guidance covering proper management of the VERA option.

## **23. 5 HMJYHG**



## **24. OPM Oversight of VERA**

OPM may modify or terminate an agency's VERA if OPM determines that the agency:

- (1) Is no longer undergoing the substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring that was the basis for OPM's approval of the VERA; or
- (2) Did not administer the authority in a manner that is consistent with applicable law or regulation.

## 25. Checklist for VERA Request

### Checklist for VERA Requests

This checklist provides agencies with a framework for submitting requests to OPM for Voluntary Early Retirement Authority (VERA). An agency requesting OPM approval of VERA for its employees should complete each section of this template to ensure that its request is properly submitted. All of the information covered in this VERA template is required by statute or regulation.

Agency: \_\_\_\_\_

Component(s): \_\_\_\_\_

Date of Request: \_\_\_\_\_

1.a. \_\_\_\_ Request is signed by the head of the agency or a specific designee with delegated authority.

1.b. \_\_\_\_ Request identifies the agency or organizational unit(s) for which a determination is requested.

2. \_\_\_\_ Clearly states reason(s) why the authority is needed:

*This should describe the circumstances leading to the request and explain why the agency believes that VERA will be an appropriate strategy for making the required adjustments in the workforce. This must include a detailed summary of the agency's personnel and/or budgetary situation that will result in an excess of personnel because of a substantial delayering, reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping.*

3. \_\_\_\_ Identify the date on which the agency expects to effect the substantial delayering, etc.

*The date provided should not be earlier than the ending date provided in number 4 below.*

4. \_\_\_\_ Show the time period during which the agency plans to offer VERA.

5. \_\_\_\_ Provide the total number of non-temporary employees in the agency or component of the agency undergoing change.

*If you are requesting VERA for only a part of your organization, provide the data for that portion of the organization only. Do not provide the number of permanent employees for the entire organization.*

6. \_\_\_\_\_ Provide the total number of non-temporary employees in the agency who may be involuntarily separated, downgraded, transferred, or reassigned as a result of the agency's situation.

*If you are requesting VERA for only a part of your organization, provide the data for that portion of the organization only. Do not provide this number for the entire organization.*

7. \_\_\_\_\_ Provide the total number of employees in the agency/organization who are eligible for early retirement.

*If you are requesting VERA for only a part of your organization, provide the data for that portion of the organization only. Do not provide the number for the entire organization. Also, for this purpose, you should exclude all employees who are eligible for optional retirement.*

8. \_\_\_\_\_ Include an estimate of the total number of employees in the agency/organization who are expected to take early retirement. The number is\_\_\_\_\_.

*If you are requesting VERA for only a part of your organization, provide the data for that portion of the organization only. Do not provide the number for the entire organization.)*

9. \_\_\_\_\_ Provide a description of the types of personnel actions anticipated as a result of the agency's need for VERA.

*This information need not be comprehensive. It should, however, be detailed enough to show how VERA will assist you in accomplishing your restructuring, reshaping, and/or downsizing plans—and the personnel actions you expect to take in concert with VERA to accomplish your goals.*



**U.S. Office of Personnel Management**

**Employee Services**

1900 E Street, NW, Washington, DC 20415

**OPM.GOV**

ES/SWP-02803-03-17



# **Guide to Voluntary Separation Incentive Payments**



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## **1. The Purpose of VSIP**

The Voluntary Separation Incentive Payment (VSIP or buyout) Authority allows agencies to offer lump-sum payments to employees who are in surplus positions or have skills that are no longer needed in the workforce, as an incentive to separate. Under VSIP, agencies may pay up to \$25,000, or an amount equal to the amount of severance pay an employee would be entitled to receive, whichever is less. Employees may separate to accept VSIP by resignation, optional retirement, or by voluntary early retirement, if authorized.

VSIPs are an option for increasing voluntary attrition in agencies that are downsizing or restructuring. Besides providing an incentive for employees to voluntarily retire or resign to avoid potential reduction in force actions, the agency may also offer VSIP to employees in safe positions that could then provide placement opportunities for employees holding surplus positions.

In its request to the Office of Personnel Management (OPM) for VSIP approval, the agency should clearly outline how VSIP would assist the agency in reaching its restructuring or downsizing goals. At all stages of developing an individual VSIP plan or a combined VSIP/VERA (Voluntary Early Retirement Authority) plan, the agency must always consider whether a sudden increase in attrition will compromise the agency's:

- (1) Ability to effectively carry out its mission; and/or,
- (2) Available fiscal resources.

## **2. Statutory Basis for VSIP Regulations**

Section 1313(b) of the Chief Human Capital Officers Act of 2002 (Public Law 107-296, approved November 25, 2002) authorized the VSIP option under regulations issued by OPM, as codified in sections 3521 to 3525 of title 5, United States Code (U.S.C.).

## **3. VSIP Regulations**

OPM implements the statutory VSIP requirements through regulations in part 576 of title 5, Code of Federal Regulations.

- The National Archives and Records Administration (NARA) provides a copy of current VSIP regulations at <http://www.ecfr.gov>.

- VSIP regulations do not apply to the Department of Defense (DoD). Public Law 108-136, approved November 24, 2003, gives DoD permanent agency-specific VERA and VSIP authority.

## 4. VSIP Planning for Organizational Effectiveness

An agency may request VSIP from OPM, and has the discretion to make certain decisions concerning how and when to use an approved VSIP authority. Before requesting VSIP, the agency should consider how VSIP would assist the agency in reaching a specific goal in human capital planning. For example, when an agency (or an agency component) is undergoing substantial restructuring or downsizing, it may consider offering VSIP as a more cost-effective and less disruptive plan than involuntary actions such as reduction in force. A comprehensive strategic workforce plan that addresses current and future human capital needs will help the agency develop the data needed to submit a formal request for VSIP authority.

The agency's plan to use the VSIP option should reflect management decisions such as whether the agency will:

- (1) Modify the structure of its components (e.g., consolidate field locations, merge line programs into smaller organizations, open field locations closer to agency customers);
- (2) Modify the span of control (e.g., eliminate existing layers of supervision, delegate additional program and administrative authority to lower level managers);
- (3) Exclude certain positions or organizations from the VSIP option to maintain organizational effectiveness (e.g., the agency would have difficulty replacing employees in certain lines of work, components, and/or geographic locations);
- (4) Use vacancies that become available because of VSIP retirements or resignations as placement opportunities for employees in surplus positions;
- (5) Offer VSIPs to all or only some of its excess employees (e.g., how many VSIP offers are possible under the agency's budget); and,
- (6) Offer VSIPs only for certain periods of the fiscal year (e.g., the agency can maximize savings if employees separate for a VSIP earlier rather than later in the fiscal year).

- ***Additional Fiscal Issues When Planning for VSIP***

An agency may pay a VSIP only from appropriations or funds available for the basic pay of the employee who separates for the incentive [5 U.S.C. 3523(b)(7)].

The one-time VSIP financial costs are particularly critical if the agency plans to offer VSIPs to employees with obsolete skills, and then restaff the positions with employees who have skills currently needed by the agency. For example, in a downsizing situation, the agency can readily achieve savings from the VSIPs in the present or the next fiscal year if the agency has a net reduction of a position because of the VSIP. In contrast, a reshaping situation generally provides no savings when the agency replaces an employee with obsolete skills who received a VSIP by the appointment of another employee with different skills. Because the agency has no net reduction in the workforce, the agency must plan for the same level of continuing salary expenses in addition to the cost of the VSIP for employees who retired or resigned.

When planning for VSIP, the agency should use a collaborative approach involving agency management, Human Resources, and Finance. The agency's decision-makers must be closely involved in all phases of plans to offer VSIPs, particularly in reshaping situations.

## **5. Preparing for VSIP**

An agency should begin planning for VSIP as soon as it appears likely that the organizational changes the agency needs to make cannot be accomplished by lesser measures (e.g., hiring freeze, normal attrition, reassignments). Early planning will ensure that the VSIP authority is available in time for both the agency and its employees to make the most effective use of the option. At the activity or subagency level, the organization should recognize that some lead time is required to develop the data to support the VSIP request, to submit the request to the agency headquarters, and then for the headquarters to formally request OPM approval of the VSIP. At each level, the activity may be asked to clarify the VSIP request, or develop additional data to support the request.

Also, to ensure that there are no agency delays in planning for VSIP offers, agency with bargaining unit employees should review existing labor agreement(s) and consider whether it has any collective bargaining obligations. The agency should follow any applicable procedures contained in the labor agreement. If, however, an agency finds it has bargaining obligations, it should plan for early negotiations.

In addition, to maximize the benefit of VSIP, the agency should allow sufficient time for important decisions such as developing activity or subagency policy on the coverage and application of the authority, preparing the human resources staff, counseling employees, holding retirement seminars, computing annuities for those considering retirement, etc. VSIP often results in an additional major workload for

an agency's human resources staff. For example, the agency must inform eligible employees of the VSIP opportunity. The agency must also advise interested employees on the amount of their incentive payment, their annuity and related issues. This process requires additional time and staff when eligible employees are widely dispersed and/or do not have access to a local human resources office. Once OPM receives an agency's VSIP request, OPM reviews the package to verify that the request is consistent with the controlling statutory and regulatory requirements.

While the VSIP request is pending approval at higher levels of the agency or at OPM, the agency should continue planning how it will use its VSIP authority. The agency should also monitor whether any of the assumptions that serve as the basis for the VSIP request have changed.

## **6. Competitive Sourcing Situations**

An agency that is undergoing a competitive sourcing study and anticipates the need for restructuring or workforce reduction to implement the outcome of the study (e.g., contracting out or establishing a Most Efficient Organization), may initiate a request for VSIP authority before the study is completed. Because of the detailed requirements related to a competitive sourcing study and the need for strict confidentiality in the process, it is difficult for the agency to forecast either the outcome of the study or the effects of the study on the agency's workforce. As a result, an agency may not be able to furnish the kind of specific data about the positions for which they wish to offer VSIP. In this situation, the agency should submit a request to OPM projecting possible outcomes, presenting "if-then" scenarios for either (1) retaining the function; or (2) contracting out. OPM may provide the agency with contingent approval for the VSIP option (i.e., the agency's need for VSIP would be subject to the outcome of the competitive sourcing study).

Before extending VSIP offers to employees, the agency must notify OPM of the outcome of the competitions. If the competitive sourcing decision will result in the agency contracting the function, OPM will authorize immediate use of the VSIP. If the competitive sourcing decision is to retain the function in the agency, the agency must provide OPM with updated information to support the VSIP.

Contingent approval benefits agencies because it:

- (1) Provides for early review of the agency's VSIP request by OPM and OMB;
- (2) Enables both the agency and OPM to respond quickly to a decision on the agency's VSIP request when the competitive sourcing study is completed;
- (3) Helps the agency retain skilled workers and maintain productivity in a competitive sourcing situation; and

- (4) Allows the agency to demonstrate positive efforts to assist employees who may be negatively affected by the results of the competitive sourcing study.

## **7. Agency VSIP Decisions**

An agency may:

- (1) Request VSIP authority from OPM;
- (2) Decide whether to use an approved VSIP authority;
- (3) Decide which employees are covered by VSIP;
- (4) Establish the VSIP window;
- (5) Determine the number of employees who may separate with a VSIP; and
- (6) Determine the maximum amount to be paid for each VSIP (with a cap of \$25,000).

## **8. VSIP Request From Agency Headquarters**

An agency's request to OPM for VSIP must be signed by:

- (1) The head of the agency; or
- (2) A specific designee (i.e., a senior officer or official within an agency who has been specifically designated to sign requests for VSIP under a designation from the head of the agency).

The agency should send its VSIP request to OPM at:

Deputy Associate Director  
Recruitment and Hiring  
U.S. Office of Personnel Management  
1900 E Street, NW  
Room 6500  
Washington, DC 20415

To expedite processing of the VSIP, the agency may email or fax its VSIP request to 202-606-4430.

For additional guidance on VSIP, the agency should contact OPM's Recruitment and Hiring (202-606-0203).

For more information, refer to the checklist for VSIP requests in Section 29.

## **9. Information in VSIP Request to OPM**

The agency may submit either a specific VSIP implementation plan outlining the intended use of the incentive payments, or the agency's human capital plan, which outlines the intended use of VSIPs. The request to OPM for VSIP authority must contain the following information:

- (1) Identification of the specific positions and functions to be reduced or eliminated, identified by organizational unit, geographic location, occupational series, grade level and any other factors related to the position;
- (2) A description of the categories of employees who will be offered VSIP, identified by organizational unit, geographic location, occupational series, grade level, and any other factors, such as skills, knowledge, or retirement eligibility;
  - Although the category listing should be general in nature, it should not be difficult to determine all of the categories of employees who will be offered VSIP, and the geographic location(s) where each category will be offered VSIP. For example: **Do say** "We plan to offer VSIP to auditors and accounting technicians in Des Moines, IA; accounting technicians in Dallas, TX; and auditors, accounting technicians and payroll clerks in Orlando, FL." **Do not say** "We plan to offer VSIP to auditors, accounting technicians, and payroll clerks in Des Moines, IA, Dallas, TX, and Orlando, FL."
  - When considering 'retirement eligibility' to determine the categories of employees who will be offered VSIP, agencies are advised to ensure they are in compliance with the Age Discrimination in Employment Act of 1967 (ADEA), as amended.
- (3) The time period during which incentives may be paid;
  - The request should include a narrative of the time period during which VSIP will be offered and the date by which employees accepting VSIP should be off the rolls. The agency should identify factors that might cause delays or complications. The agency should provide an explanation for the length of the time period required.



- (4) The number and maximum amounts of VSIPs to be offered;
- (5) A description of how the agency will operate without the eliminated or restructured positions and functions;
- (6) A proposed organizational chart displaying the expected changes in the agency's organizational structure after the agency has completed the VSIPs;
  - This chart should show the agency (or component within the agency, if the VSIP request is for a single component) minus the eliminated, restructured or redescribed positions (different grade, title, function(s), etc.). To effectively show the meaning of this information, it would be useful to display a current organization chart as well.
- (7) A short explanation of how Voluntary Early Retirement Authority (VERA) will be used in conjunction with VSIP, if the agency has requested, or will request VERA.
  - This discussion should explain the extent to which the agency believes it will reach its goals by combining VERA with VSIP as an enticement for voluntary separation. If the agency believes that VERA, when used with VSIP, may encourage employees to retire early to receive a VSIP, it should provide that information and explain the anticipated, positive effect that VERA will have on the VSIP acceptance rate.
- (8) A description of how VSIPs offered under another statutory authority are being used, if the agency is offering incentives under any other statutory authority.
  - This item is for agencies that may still have a single agency VSIP law. If that is the case, the agency should discuss the number of incentives it plans to offer under each VSIP authority, broken down as described in item two above. If the agency has no single agency VSIP authority, it should enter "not applicable." in response to this item.

The VSIP template in Section 29 provides more information about these requirements.

## **10. Basis for OPM Approval of VSIP Request**

OPM will conduct a review of the agency request in the context of the agency's human capital or VSIP implementation plan and goals, and ensure that all necessary information is included to evaluate the need.

OPM will consult with the Office of Management and Budget regarding the plan and subsequent modifications to the plan, and may consider the costs and benefits associated with using the authority. If there are questions concerning the agency's plan, OPM may contact the agency, inform agency staff of its concerns, and ask the agency to submit additional information to support its request or revise the plan to comply with VSIP regulations.

Before OPM will approve a new VSIP authority for an agency, the agency must forward any outstanding reports (generally, a copy of the most recent quarterly report) on the use of any previously approved VSIP authorities, as required under the original authority.

OPM will notify the agency once the VSIP authority is approved and will fax a signed copy of the response to the contact person listed on the request immediately upon approval. To ensure a prompt response from OPM, it is critical that the VSIP request include the name, title, telephone number, and fax number of an agency contact person.

## **11. Maximum Time Period for VSIP Option**

OPM may approve an agency's VSIP request to be effective through either:

- (1) The entire period of the agency's restructuring period as detailed in the VSIP implementation plan; or
- (2) The initial portion of the period covered in the VSIP implementation plan, with a requirement for subsequent information and justification if the period covers multiple years.

## **12. General Eligibility for VSIP**

To be eligible to separate with a VSIP, an employee must:

- (1) Be serving under an appointment without time limitation;
- (2) Be currently employed by the Executive Branch of the Federal Government for a continuous period of at least 3 years;
- (3) Be serving in a position covered by an agency VSIP offer as described above;

- (4) Apply for and receive approval for a VSIP from the agency making the VSIP offer; and
- (5) Not be included in any of the ineligibility categories listed in Section 13 below.

## **13. Ineligibility for VSIP**

Employees in the following categories are not eligible for VSIP:  
Employees who:

- (1) Are reemployed annuitants;
- (2) Have a disability such that the individual is or would be eligible for disability retirement;
- (3) Are in receipt of a decision notice of involuntary separation for misconduct or unacceptable performance;
- (4) Previously received any VSIP from the Federal Government;
- (5) During the 36-month period preceding the date of separation, performed service for which a student loan repayment benefit was paid, or is to be paid;
- (6) During the 24-month period preceding the date of separation, performed service for which a recruitment or relocation bonus was paid, or is to be paid; or
- (7) During the 12-month period preceding the date of separation, performed service for which a retention bonus was paid, or is to be paid. (This applies to General Schedule employees only.)

## **14. Employees on Active Duty in the Armed Forces**

Chapter 43 of title 38, United States Code, requires that agencies treat employees on military duty, for all practical purposes, as though they were still on the job. Further, employees are not to be disadvantaged because of their military service. An employee on active duty in the Armed Forces who would otherwise be eligible for a VSIP offer will have 30 days following restoration to the agency to accept or reject the agency's offer of VSIP.

- The restored employee has the right to accept or reject the agency's offer of VSIP, even if the authority approved by OPM has expired.

## **15. Employees on Leave without Pay, Workers' Compensation, Details, etc.**

Agencies must inform employees on leave without pay, workers' compensation, details outside the agency, etc., of VSIP offers that would cover them.

## **16. Employees with Service Agreements**

Common service agreements cover an employee's obligation to perform service with the agency for a specific period of time following training, relocation, or similar situations. An agency should request an interpretation from its legal staff before deciding whether to release from a service agreement an employee who is interested in separating for a VSIP.

## **17. Implementing the VSIP Plan**

### **• Organizational Basis for VSIP Offers**

After the agency has received authority from OPM to offer VSIP [whether throughout the entire agency or for specific organizational unit(s)], the agency shall further limit the availability of the VSIP based on:

- (1) One or more organizational unit(s);
- (2) One or more occupational series or grade(s);
- (3) One or more geographic area(s);
- (4) Skill, knowledge, or other factors related to a position;
- (5) Specific time periods during which eligible employees may elect to accept a VSIP offer; or
- (6) Any combination of the factors listed above.

An agency cannot expand voluntary separation incentive offers beyond the scope of the authority approved by OPM.

- **Selecting Employees for VSIP**

A VSIP is not an entitlement for an employee who is potentially eligible for a VSIP. For situations where the agency may need to limit the number of employees who are approved for VSIP, the agency should have an impartial formal procedure to make these decisions.

The agency should finalize its selection procedures before accepting applications from employees for VSIP separations.

For consistency, the agency may also decide to use the same procedure to determine which employees will separate under a Voluntary Early Retirement Authority (VERA) when a VSIP is not offered.

Standard selection procedures may include (but are not limited to):

- Total creditable Federal civilian service;
- Total creditable Federal civilian service in the agency or in the organizational component offering the VSIP; or
- First-in, first-out (i.e., accepting the first applications received, up to an established limit).

The agency's selection procedure should be clearly communicated to its employees in the notice announcing the VSIP plan.

- **Establishing "Windows"**

The agency has the right to establish 'windows;' that is, the time period(s) during which it will accept applications for VSIP and to set the time period(s) for employees to retire or resign for VSIP. The agency may open such windows at any time during which it has VSIP authority, provided that the agency includes the information in its VSIP plan to OPM, and OPM subsequently approves the plan after consultation with OMB.

Neither the controlling statute nor OPM's implementing regulations defines a maximum or minimum time period for a VSIP window. The only restriction is that an employee may not separate for a VSIP past the ending date of the OPM-approved VSIP plan.

If the agency is also offering employees the option of retiring under a Voluntary Early Retirement Authority (VERA), the agency should coordinate the VSIP and VERA windows to maximize the effectiveness of both programs.

The agency has many potential options to implement effective VSIP windows for employees. Some examples include:

- In a budget driven situation, only offering VSIP early in the fiscal year to maximize net savings after including the cost of each VSIP;
- Establishing opening and closing dates which are announced to employees at the time of the initial offer;
- Receiving a specified number of applications for a VSIP, provided that, at the time of the initial offer, the agency notified employees that it retained the right to limit voluntary VSIP on that basis; or
- Extending the VSIP offer only to employees in specific organizational unit(s), occupational series or grade(s), geographic area(s), or employees in possession of certain knowledge or skills -- as long as the authority issued by OPM covers them.

Generally, the agency must notify employees whenever the parameters of a VSIP offer have changed.

- **Additional Considerations**

The agency may subsequently establish a revised closing date, or a revised number of VSIP applications, if management's downsizing and/or reshaping needs change. If the agency issues a revised closing date, or a revised number of VSIP applications to be accepted, the revised date or number of applications must be announced to the same group of employees included in the original announcement. If the agency issues a new window with a new closing date, or a new instance of a specific number of VSIP applications to be accepted, the new window or number of applications may be announced to a different group of employees as long as they are covered by the approved VSIP authority.

After announcing a time period during which employees may apply for VSIP, the agency may terminate the offers before the closing date upon receipt of a previously specified number of VSIP applications — if the announcement indicated that a specified number of VSIP applications would be sought. If the offer did not discuss a specific number of applications the agency wished to receive, the specified window for receipt of applications should be observed unless conditions necessitate a reduction in or cancellation of the requirements for VSIP. The agency's notice should also advise employees that, subject to changes in the situation on which the VSIP was based, the agency may need to further limit VSIP offers after such offers are announced.

Agencies are urged to consider the impact of the length, timing, and availability of VSIP offers on employee decisions to separate. For example, long-term availability or repeated offers may create an atmosphere in which employees

choose not to accept VSIP because they assume that another opportunity will be available--should they decide to wait. Brief offers which do not afford employees the opportunity to consider the impact of this major career decision may also minimize effectiveness. VSIPs are most effective when offers are definitive, brief (but of sufficient duration to allow employees to make proper decisions), and not likely to be repeated.

- **Accepting Applications for VSIP**

An agency must accept VSIP applications from all employees eligible under the OPM-approved plan.

The agency must limit the number of actual separations for a VSIP to no more than the number in the OPM-approved VSIP plan.

## **18. VSIP Offers Must Be Consistent With OPM-Approved Authority**

An agency may offer VSIP only as authorized in the agency-specific authority approved by OPM.

- An agency may not offer or process VSIP actions beyond the expiration date stated in the VSIP plan approved by OPM.
- An agency may not offer VSIP to employees not covered in the VSIP Plan approved by OPM.

## **19. Computation of Payments**

An agency computes a VSIP on the basis of the **lesser** of:

- (1) An amount equal to the amount of severance pay the employee would be entitled to receive, as computed under 5 U.S.C. 5595(c), without adjustment for any previous payment made; or
- (2) An amount determined by the agency head, not to exceed \$25,000.

In counseling employees and providing VSIP estimates, the agency should stress that an employee who separates for a VSIP actually receives a net amount after mandatory withholding deductions, not the gross amount of the VSIP.

In counseling employees interested in voluntarily separating for a VSIP, the agency should advise employees that the agency may reduce the gross amount of the VSIP for certain outstanding employee debts, including any:

- Debt the employee owes to the agency;
- Commercial garnishment (including supplemental fees or court-ordered interest);
- Alimony covered by a court order; and/or
- Child support covered by a court order.

## **20. Waiver of Usual Participation Requirement to Continue Health Benefits into Retirement**

Employees retiring in conjunction with a VSIP or VERA authority must have been covered under the FEHB Program either: (1) for the last 5 years of their Federal civilian service in order to continue such coverage in retirement, or (2) if less than 5 years, for all service since the employee was eligible for FEHB program benefits unless these requirements are waived.

OPM will grant pre-approved waivers to employees who meet (1), (2), or (3).

- (1) Have been covered under the FEHB Program continuously since the beginning date of the agency's latest statutory VSIP authority, or OPM-approved VSIP or VERA authority;  
**and**
  - Retire during the statutory VSIP or OPM-approved VSIP/VERA period;
  - and**
  - Receive a VSIP.
- (2) Take early optional retirement.
- (3) Take discontinued service retirement based on an involuntary separation due to RIF, directed reassignment, reclassification to a lower grade, or abolishment of position.

Employees who meet (1), (2), or (3) do not need to request a waiver. Instead, agencies must attach a statement to the employee's retirement application noting that the employee meets the requirements for a pre-approved waiver by OPM as set forth in OPM's specific instructions to the agency; refer to Benefits Administration Letter (BAL) 04-208, dated September 8, 2004. If the VSIP authority is based on a specific legal authority, the agency will need to provide an appropriate citation. Otherwise, the agency must provide the VSIP authority or



VERA approval number that OPM assigned to the agency, and include the beginning and ending dates of the agency's VSIP or VERA authority.

Some employees who retire during a VSIP or VERA period may not be eligible for a pre-approved waiver. These include employees who retire on a regular optional retirement but do not qualify for a VSIP. Employees who do not qualify for a pre-approved waiver may request a waiver on a case-by-case basis by writing to OPM and asking OPM to waive the participation requirement in their case. OPM may grant waivers to some of these employees; each case will be considered on its own merits, based on criteria that are applied to all other retiring employees as outlined in the FEHB Handbook in the section entitled Annuitants and Compensators.

BAL 04-208 explains OPM's policy on waivers of the usual participation requirements for employees who retire during a period during which their agency has statutory authority to offer VERA or VSIP. This is available from OPM's website at [www.opm.gov](http://www.opm.gov).

## **21. Ensuring that VSIP Separations are Voluntary**

The agency is responsible for ensuring that employees are not coerced into separation under VSIP, and for ensuring that the employee's decision is not based on erroneous or misleading information.

When announcing an opportunity to separate with a VSIP, the agency should inform its employees that separation by retirement or resignation for a VSIP is a voluntary action by the employee. If the agency finds that an employee was coerced into separating, the agency has the responsibility to take appropriate corrective action. An employee who separates with a VSIP, but who believes that the separation was involuntary, may appeal the basis for the separation to the Merit Systems Protection Board.

An agency's optional canvass letter to determine potential employee interest in a VSIP is not coercion, but is simply an accepted tool to help the agency meet its present and future staffing needs.

## **22. Processing VSIP Separations**

The "Guide to Processing Personnel Actions" contains processing instructions for VSIP separations.

- (1) For CSRS employees retiring with a VSIP under the VERA option, the Guide states that Authority Code “ZLM/P.L. 107-296, VERA No. and date” covers employees under the Civil Service Retirement System.
- (2) For FERS employees retiring with a VSIP under the VERA option, the Guide states that Authority Code “USM/5USC Chapter 84 and AZM/OPM Office, VERA No. and date” covers employees under the Federal Employees Retirement System.
- (3) For regular optional retirements, follow the instructions in Chapter 30 of the Guide.
- (4) For resignations, see Chapter 31 of the Guide.

The Guide states that the agency may use blocks 6A through D of the same Standard Form 50 to record receipt of the VSIP using Nature of Action “825/Separation Incentive” and Authority Code “ZAA/P.L. 107-296” to record the employee’s receipt of the VSIP.

## **23. Establishing Effective Dates**

An agency may establish “off the rolls” dates for VSIP recipients. Separation dates must occur within the time period during which the agency has an OPM-approved VSIP authority, as identified in the agency’s approval letter.

## **24. Agencies with Statutory VSIP Authority**

Agencies exercising VSIP authority in effect on January 24, 2003, may continue to offer VSIP consistent with that authority until it expires. An agency that is eligible to offer VSIP under the authority described in this Guide and under any other statutory authority may choose which authority it wishes to use, or offer VSIP under both.

## **25. Waiver of VSIP Repayment Requirement**

An executive branch employee who received a VSIP and accepts employment for compensation with the Government of the United States within 5 years of the date of the separation on which the VSIP is based, including work under a personal services contract or other direct contract, must repay the entire amount of the VSIP to the agency that paid it before the individual's first day of reemployment.

If the proposed employment is with an agency other than the Government Accountability Office, the United States Postal Service, or the Postal Rate Commission, the Director of the Office of Personnel Management may, at the request of the head of the agency, waive the repayment if the proposed reemployment is with an Executive agency, and

- (1) The individual involved possesses unique abilities and is the only qualified applicant available for the position; or
- (2) In case of emergency involving a direct threat to life or property, the individual:
  - (a) has skills directly related to resolving the emergency; and
  - (b) will serve on a temporary basis only as long as the individual's services are made necessary by the emergency.

If the proposed reemployment is with an organization in the legislative branch, the head of the organization or the appointing official may waive the repayment if the individual involved possesses unique abilities and is the only qualified applicant available for the position.

If the proposed reemployment is with the judicial branch, the Director of the Administrative Office of the U.S. Courts may waive the repayment if the individual involved possesses unique abilities and is the only qualified applicant available for the position.

Some agencies may still have their own buyout laws, or have had buyout laws that have expired only recently. Many employees received buyouts under these laws. The eligibility of these employees to be reemployed by the Government within 5 years of buyout receipt or to have prospective employing agencies request buyout repayment waivers from OPM depends on the provisions of the buyout laws under which these buyouts were paid.

---

\*Note: The Department of Defense (DoD) has its own VSIP law, Public Law 108-136, and the provisions for DoD VSIP recipients who may be subject to VSIP repayment if reemployed by DoD differ from the requirements stated above.

## **26. Agency Management of VSIP**

Once the agency receives VSIP authority, the goals defined in the agency's implementation plan will assist the agency in monitoring the authority and, if necessary, in adjusting the plan while it is underway (for example, to close the VSIP window after reaching the agency's workforce targets).

- Should the agency find that the basis under which it requested and received VSIP from OPM no longer exists, it must suspend its use of VSIP and immediately notify OPM.
- OPM may modify or terminate an agency's VSIP authority if OPM determines that the agency is no longer undergoing the substantial reorganization, reduction in force, transfer of function, or other workforce restructuring or reshaping which formed the basis for OPM's approval of the authority or if the agency deviates significantly from the VSIP plan it submitted. OPM may also take steps to amend, limit, or terminate an authority to ensure that the agency makes VSIP offers in a manner that is consistent with applicable laws, regulations or program policies.

## **27. 5 HHHUHG**

## **28. OPM Oversight of VSIP**

OPM may modify or terminate an agency's VSIP authority if OPM determines that the agency:

- (1) Is no longer undergoing a period of substantial restructuring or downsizing that was the basis for OPM's approval of the VSIP; or
- (2) Did not administer the authority in a manner that is consistent with applicable law or regulations; or
- (3) Failed to meet reporting deadlines or requirements.

## **29. Checklist for VSIP Request**

The VSIP checklist is an easy to follow document that can be used to help develop VSIP requests. A thorough response to each element on the checklist should result in properly submitted VSIP requests and may reduce the amount of time needed by OPM to process the request.

### Checklist for VSIP Requests

Agency: \_\_\_\_\_  
Component(s): \_\_\_\_\_  
Date of Request: \_\_\_\_\_

---

A. The agency's request includes a: \_\_\_\_ VSIP Implementation Plan \_\_\_\_ Human Capital Plan?

The intended use of VSIP:

\_\_\_\_\_  
\_\_\_\_\_

The plan includes:

1. \_\_\_\_ Identification of specific positions and functions to be reduced or eliminated (identified by organizational unit, geographic location, occupational category, grade level and any other factors related to the position).
2. \_\_\_\_ A description of the categories of employees who will be offered incentives (identified by organizational unit, geographic location, occupational category, grade level and any other factors such as skills and knowledge, or retirement eligibility)
3. \_\_\_\_ The time period during which incentives may be paid.
4. \_\_\_\_ The number and maximum amounts of voluntary separation incentive payments to be offered (i.e., approved).
5. \_\_\_\_ A description of how the agency will operate without the eliminated/restructured positions.
6. \_\_\_\_ A proposed organizational chart displaying the expected changes in the agency's organizational structure after the agency has completed the incentive payments.
7. \_\_\_\_ If the agency has requested VERA, an explanation of how that authority will be used in conjunction with VSIP.
8. \_\_\_\_ If the agency is offering separation incentives under other statutory authority, a description of how that authority is being used.
9. \_\_\_\_ Verification that Agency VSIP/VERA reports are up to date (i.e., have been submitted to OPM in compliance with any existing authorities).



**U.S. Office of Personnel Management**

**Employee Services**

1900 E Street, NW, Washington, DC 20415

**OPM.GOV**

ES/SWP-02803-03-17

## Appointment

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**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 4/20/2017 7:03:15 PM  
**To:** Vizian, Donna [Vizian.Donna@epa.gov]; OARM Directors [OARM\_Directors@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]; Bell, Matthew [Bell.Matthew@epa.gov]; Jablonski, Janice [jablonski.janice@epa.gov]; Lemley, Lauren [Lemley.Lauren@epa.gov]; Bashista, John [Bashista.John@epa.gov]  
**CC:** Carter, Rick [Carter.Rick@epa.gov]; Patrick, Kimberly [Patrick.Kimberly@epa.gov]; Hardy, Michael [Hardy.Michael@epa.gov]; Helm, Arron [Helm.Arron@epa.gov]; Franklin, Bruce [Franklin.Bruce@epa.gov]; Noga, Vaughn [Noga.Vaughn@EPA.GOV]; Scola, Jennifer [Scola.Jennifer@epa.gov]; Showman, John [Showman.John@epa.gov]; Collins, BJ [Collins.BJ@epa.gov]; Ward, Mary-Beth [Ward.Mary-Beth@epa.gov]; Blankenship, Steven [Blankenship.Steven@epa.gov]; Petrole, Maryann [Petrole.Maryann@epa.gov]; Polk, Denise [Polk.Denise@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Amorosi, Joanne [Amorosi.Joanne@epa.gov]; Legare, Pamela [Legare.Pamela@epa.gov]; Neal, Kerry [neal.kerry@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** Office Director Discussion  
**Location:** DCRoomARN3330/DC-AR-OARM  
**Start:** 4/26/2017 12:30:00 PM  
**End:** 4/26/2017 3:30:00 PM  
**Show Time As:** Busy

Purpose: Follow-up discussion from the Office Directors meeting on 4/20 to have a 3 hour meeting on VERA/VSIP.



**From:** Westenberger, Andrea  
**Location:** Ex. 6 - Personal Privacy  
**Importance:** Normal  
**Subject:** ARA-OARM Call  
**Start Date/Time:** Tue 5/16/2017 3:30:00 PM  
**End Date/Time:** Tue 5/16/2017 4:30:00 PM  
SEE Telework Final Apr10.docx  
FedTalent\_LMM Proposal Presentation FINAL May2017 (OEI-OCFO).pptx

## ARA-OARM Call

Tuesday, 5/16, 8:30 am – 9:30 PST

Ex. 6 - Personal Privacy

*Note: To reduce costs, please call the 1-866 number in groups as we are charged per line/per minute.*

[Join Skype Meeting](#)

Topic #	Topic Title & Purpose	Materials	Presenter(s)/Office	Time (PST)
1	Roll Call		Andrea Westenberger (Region 10 LRC)	8:30 – 8:35 (5 min)
2	Grants Reporting Requirements for Office of Public Affairs/John Konkus (Deputy Associate Administrator for OPA)		Denise Polk (OARM-OGD)  Nancy Grantham (OA-OPA)	8:35 – 8:50 (15 min)
	Ex. 5 - Deliberative Process			
	● <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Note:			

	<div>Ex. 5 - Deliberative Process</div> <div>John Konkus Meet &amp; Greet on 5/17</div> <div>Ex. 5 - Deliberative Process</div>			
2	<div>SEE Telework Policy</div> <div>Ex. 5 - Deliberative Process</div>	SEE_Telework_Final_Apr10	Dan Coogan (OARM)	8:50 – 9:05 (15 min)
3	<div>FedTalent Learning Management System</div> <div>Ex. 5 - Deliberative Process</div>	FedTalent_LMM_Proposal_Presentation FINAL May 2017 (OEI-OCFO)	Stewart Dean	9:05 – 9:20 (15 min)
4	VERA/VSIP &		TBD	9:20 – 9:30 (10 min)

	Workforce Reshaping (if time allows)			min)
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Upcoming ARA Calls

Tuesdays, 8:30 am – 9:30 PST

- May 9: ARA-OCFO
- May 16: ARA-OARM
- May 23: ARA-OEI
- May 31 (Wednesday): ARAs-Only (Optional)
- June 6: ARA-Only VTC
- June 13: ARA-OCFO
- June 27: ARA-OEI

For questions or agenda items, please contact Andrea Westenberger, Lynnann Hitchens, and Michael Hardy.

**From:** Vizian, Donna  
**Location:** DCROOMWJCN3330Q  
**Importance:** Normal  
**Subject:** EMC Follow-up  
**Start Date/Time:** Tue 4/11/2017 3:00:00 PM  
**End Date/Time:** Tue 4/11/2017 3:30:00 PM  
EPA VERA-VSIP Template Rev.doc

As a result of the VERA/VSIP discussion at the EMC yesterday, Donna agreed to send the EMC members a template and data for each organization. I have attached what may have been the template we used in 2013.

Meeting requested by: J.Showman (4/5/2017) (KLW)

Message

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**From:** Gray, Linda [gray.linda@epa.gov]  
**Sent:** 6/14/2017 4:14:25 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]  
**CC:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** FW: CHCO Bulletin for the week of June 9th

**Linda R. Gray**

Director, Office of Human Resources  
Office of Administration and Resources Management  
Environmental Protection Agency  
(202) 564-4606 phone  
(202) 564-4613 fax

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**From:** Vizian, Donna  
**Sent:** Wednesday, June 14, 2017 10:25 AM  
**To:** Helm, Arron <Helm.Arron@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Gray, Linda <gray.linda@epa.gov>  
**Subject:** FW: CHCO Bulletin for the week of June 9th

Please see June 15<sup>th</sup> webcast on workforce reshaping. It would be good for a few folks to participate. Also, there will be a session on 6/29 at OPM on workforce reshaping with limited attendance. It would be good if both OHR and the SSC could attend. thanks

---

**From:** CHCO Council [mailto:chcoc=opm.gov@mail184.suw18.rsgsv.net] **On Behalf Of** CHCO Council  
**Sent:** Friday, June 09, 2017 2:40 PM  
**To:** Vizian, Donna <Vizian.Donna@epa.gov>  
**Subject:** CHCO Bulletin for the week of June 9th

*BY BCC TO CHCO COMMUNITY*

[View it in your browser.](#)



## CHCO COMMUNITY NEWS

on,

on, We have a busy week ahead of us! On Tuesday, we look forward to everyone at the Full Council meeting. Then, on Thursday June 15th, we will have Marcus Buckingham, who will speak on how Federal leaders can build an agile and high performing workforce, while future-proofing their organizations. We hope everyone can make it out for these two engagements.

Today is the last day to finish any online courses on HRU.gov and use your profile to print or save certificates, transcripts, self-assessments and individual development plans. On Monday, June 12th, HRU will require you to log-in and will continue to be the comprehensive, one-stop HR and HR Resources (HR) career development website.

weekend.

Colobos  
**Executive Director**  
**Chief Human Capital Officers Council**  
Personnel Management  
NW

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### ~UPDATE~ **STEM Diversity Recruiting event**

Monday, June 19, 2017 | 11:30 AM - 1:00 PM  
Partnership for Public Service in Washington D.C.

We invite you to join us for the STEM Diversity Recruiting event hosted by the Partnership for Public Service in Washington D.C. on Monday, June 19th, 2017 at The Partnership for Public Service in Washington D.C. from 11:30 AM – 1:00 PM.

The event and technology sectors are coming together to share insights and best practices for improving workplace diversity in a new forum. There will be a panel of Diversity & Inclusion Recruitment experts from LinkedIn, Google, and The Department of Veterans Affairs, moderated by Kathy Goss, Senior Diversity Recruiting Leader. The panel will be sharing advice on overcoming hiring bias, the role of assessments, executing diversity strategies and more!

Interested - [RSVP HERE](#)

We hope you are there!

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**You are Invited: Marcus Buckingham, Architect a New World of High-Performance Culture**



[Forward to a Friend](#)



[www.chcoc.gov](http://www.chcoc.gov)

**CLICK HERE TO SUBSCRIBE**

<http://chcoc.us4.list-manage1.com/subscribe?u=86c2d6400166a1c61e3659616&id=>

\*Subscribe to the above link using your federal email address

## Calendar of Events

All Meetings and Events can be found [Here](#)

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## CHCO Corner

This section of the bulletin is reserved for events and activities for CHCOs and Deputies only.

### Market Research Day

USSM is hosting a market research day on Monday, June 26 to get a better understanding of vendor capabilities for payroll and/or time and attendance software-as-a-service solutions.

We are asking for up to 10 representatives from the CHCO community to participate. If you are interested please email Austin Price at [austin.price@gsa.gov](mailto:austin.price@gsa.gov).

June 15, 2017 | Washington, D.C.

Executive Institute and the Chief Human Capital Officers Council  
most, Marcus Buckingham, Architect a New World of High-  
Culture.

Federal leaders can build a more agile and high performing  
while future-proofing their organizations. Marcus Buckingham,  
an expert on strengths and talent, will provide a keynote address on  
employee and organizational performance for Cross Executive  
Officers and their senior staff on **Thursday, June 15, from 10 am  
to 12:30 PM, in the Office of Personnel Management, Campbell**

Marcus Buckingham has dedicated his career to understanding what the world's  
leaders do. For more information about Marcus Buckingham,  
<https://www.marcusbuckingham.com/>.

For more information and to register please visit  
[central.usalearning.net/onsite/](http://central.usalearning.net/onsite/). Please direct any questions to  
the OPM. We look forward to seeing you there!

#### **Event~ Reduction in Force: Planning and Best Practices**

June 15, 2017 | Washington, D.C.

This event, **Reduction in Force: Planning and Best Practices**, will be  
held on **June 15th from 1 PM to 3 PM in the OPM Auditorium and via**  
webcast. This session will dive into the important policy and operational  
challenges facing agencies that are preparing for a Reduction in Force (RIF).  
Senior resources leaders and program managers who have been through  
RIFs will share their best practices and advice.

Register to attend at [https://www.eventbrite.com/e/reduction-in-force-  
best-practices-tickets-34883759263](https://www.eventbrite.com/e/reduction-in-force-best-practices-tickets-34883759263)

#### **UPDATE~ 2017 Feds Feed Families (FFF) Campaign**

The Feds Feed Families (FFF) Campaign kickoff was held on Wednesday,  
June 14th at the Capital Area Food Bank. It was a huge success with chairs  
filled across many federal agencies showing their support, including  
a large food donation to start. This year's theme is "Feds Unite Against  
Hunger." National Program Manager Betty-Ann Bryce opened the event with a  
message to all Federal Agencies to "beat their best" effort to date. This was  
followed by presentations by Roger Glendenning, USDA Rural Development  
Administrator, Under Secretary, Jody Tick, Chief Operating Officer, Capital Area  
Food Bank, Malcolm Shorter, Deputy Assistant Secretary for Administration at  
HHS, G. Layton, 2016 Department of Education Chair, Vice Admiral  
Michael G. Smith, 2017 Department of Homeland Security Chair, Berthina Jamison,  
Assistant Secretary of Defense Champion, Gary Oppenheimer, CEO of  
Boys & Girls Clubs of America, and Reverend Chandler of the Mid-Atlantic Gleaning  
Network (MAGNET). Each discussed the value added by the food drive. In fact,  
they estimated that FFF the Feds Feed Families food drive provided 500,000

#### **Partnership for Public Service Event**

In an effort to drive efficiency and effectiveness in the  
federal sector, the Partnership for Public Service is  
hosting an event on **June 23 from 8-10:30 a.m.** for  
agency leaders to learn about business enterprise services  
from leading private sector companies.

Our focus will be on cost savings and avoidance, impact  
on the workforce and the need for reskilling and job  
changes, risk, and key lessons learned that might inform  
how federal agencies should move forward.

If you are interested in attending this event or learning  
more, please contact Lindsay Laferriere at  
[llaferriere@ourpublicservice.org](mailto:llaferriere@ourpublicservice.org).

### **Workforce Reform Information**

#### **Comprehensive Plan for Reforming the Federal Government and Reducing the Federal Civilian Workforce**

[https://www.whitehouse.gov/sites/whitehouse.gov/files/  
omb/memoranda/2017/m-17-22.pdf](https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/memoranda/2017/m-17-22.pdf)

#### **FY 2018 Budget Blueprint**

[https://www.whitehouse.gov/sites/whitehouse.gov/files/  
omb/budget/fy2018/2018\\_blueprint.pdf](https://www.whitehouse.gov/sites/whitehouse.gov/files/omb/budget/fy2018/2018_blueprint.pdf)

#### **Workforce Reorganization Executive Order**

[https://www.whitehouse.gov/the-press-  
office/2017/03/13/presidential-executive-order-  
comprehensive-plan-reorganizing-executive](https://www.whitehouse.gov/the-press-office/2017/03/13/presidential-executive-order-comprehensive-plan-reorganizing-executive)

\*Please note if this is your first time visiting the new  
[whitehouse.gov](http://whitehouse.gov) website, you will be sent to a welcome page instead  
of the memo. Please click on the link a second time once you go  
through the welcome page.

This section will be updated as new guidance is released.

### **Upcoming Meetings**

**Full Council Meeting**  
Tuesday June 13, 2017  
10am to 12pm

ed for people across DC, Maryland and Virginia last year. It has  
ritical means by which food banks fill their shelves during the  
one-hour program was closed by Edna Primrose, Deputy  
r for Operations and Management, USDA Rural Development.

ews were conducted at the event, marking a memorable start to the  
airs and champions enthusiastically responded to questions such  
s campaign important? and, Why did they choose to volunteer?  
Hayes of the US Coast Guard, Oscar Morales of the Environmental  
ency, Berthina Jamison of the Department of Defense, and Joyceda  
Defense Civilian Personnel Advisory Service all expounded on the  
f the campaign.

Program office is committed to supporting Agency Chairs and  
making their campaigns as successful as possible. The week closed  
onal Chairs and Champions Training to provide the group with the  
ources to lead a successful campaign. Our Chairs and Champions  
ongoing and we hope to capture a few more over the course of the  
please spread the word. In addition, there will be the annual golf  
his year. We invite you to get a team together for this fun event  
Saturday, July 29. To find out more, please e-mail  
ies@usda.gov.

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### **ApprenticeshipUSA Federal Accelerator**

st 30, 2017 | Washington, D.C.

ognized ApprenticeshipUSA programs provide a valuable method  
developing and retaining employees in highly-skilled  
Apprenticeship can be expanded within the Federal Sector job  
hways structure to accelerate the productivity of new hires and to  
urrent Federal workforce. It can also be used to expand and sustain  
, procurement and workforce programs to help American workers  
rs.

**is for the Federal Accelerator on Wednesday, August 30,  
hington, D.C.** This event is an opportunity for you and your  
gues to learn about ApprenticeshipUSA and specific ways they can  
pprenticeship in their agencies.

rmation contact:

z, Deputy Administrator, Office of Apprenticeship,  
e.a@dol.gov  
Program Analyst, Office of Apprenticeship, [david.rachel@dol.gov](mailto:david.rachel@dol.gov)

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### **ON FOR SECOND CYBERSECURITY ORIENTATION FOR NEW HIRES**

**\*\* Spread the word \*\***

**7 from 8:00 AM – 4:30 PM**

he Federal Chief Information Officers Council and the U.S. Office

Executive Conference Room

**Deputy CHCO Meeting**  
**Thursday July 20, 2017**  
**10am to 12pm**  
**Pendleton Room**

CHCOs, Deputies, & Assistants,  
Click [here](#) to access meeting materials

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## **In Case You Missed It...**

### **OPM Memos**

**Biennial Review of Executive Resources Allocations for  
Fiscal Years 2018 and 2019 Update**

**Update to Fiscal Year 2017 Prevailing Rate Pay  
Adjustments**

**Continued Pay Freeze for Certain Senior Political  
Officials**

### **Other News**

**Keeping Employees Engaged During Periods of  
Uncertainty**

**HR Leader: Millennials Helping to Shape Better  
Workplace**

**The employee value proposition matters now more than  
ever for recruiting**

**Resource Actions: Does HR have a 'humanity' problem?**

**Trump chooses George Nesterchuk to head OPM**

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## **OPM Resources**

### **Workforce Reshaping**

Introducing [www.opm.gov/reshaping](http://www.opm.gov/reshaping), OPM's newest  
one-stop shop of information and resources for agency  
leaders and human resources professionals who are  
engaged in strategic workforce planning efforts or  
considering workforce reshaping options.



Management (OPM) are sponsoring the second cybersecurity for new cybersecurity professionals. Leading Cybersecurity in the Federal Government will share personal experiences and career paths. Participants will obtain an understanding of their role in the Federal Government's cybersecurity mission. The orientation includes keynote speeches from Government leaders, presentations by senior cybersecurity practitioners, a Knowledge Lab that provides information and resources on Cybersecurity tools, and the opportunity to network with cybersecurity professionals from across the government.

#### **Speakers:**

Special Assistant to the President, Cybersecurity Coordinator  
Gettigan, Director (Acting), OPM

**Attend?** This event is free and open to Federal employees in GS-15 (or equivalent) with one year or less of Federal work experience.

Department of Transportation Conference and Event Center, 1200  
Avenue, S.E., Washington DC, 20590.

**Registration:** Event capacity is limited to 230 participants, please submit your registration now at <https://www.eventbrite.com/e/second-cybersecurity-conference-registration-34004994855>

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#### **Benchmarking Results Available on Benchmarks.gsa.gov**

Benchmarking results are available on [Benchmarks.gsa.gov](https://benchmarks.gsa.gov). This will be very helpful in preparing for this year's reform discussions, supporting your own management decision making. The website also includes tools for exporting data and graphics, which you can use in your own reports.

#### **Overview of the types of data available on the website:**

- Component comparisons of cost and quality
- Showing cost-quality trade-offs
- Trend lines (showing four years of data whenever possible)
- Data from the 2017 Customer Satisfaction Survey

The benchmarking team is also working on summary agency reports, which we will be releasing out within the next few weeks.

To access the Benchmarking site using your MAX credentials. If you need MAX, please go to <https://www.gsa.gov/maxportal/registrationForm.action>. Please feel free to send me any questions or contact us at [benchmarks@gsa.gov](mailto:benchmarks@gsa.gov).

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## WMATA Safe Track Update

To access special notices from OPM regarding the SafeTrack Project, to include memorandums and guidance, please follow this link:

<https://www.opm.gov/policy-data-oversight/snow-dismissal-procedures/notices/#WMATA>

Upcoming Surge:  
Surge #15, May 16-June 15  
New Carrollton to Stadium-Armory  
Orange line shutdown

For more information visit:  
<https://www.wmata.com/service/SafeTrack.cfm>

## **ditional and Executive Affinity Groups Annual Training Programs and Workshops**

an Government Employees Network (AAGEN)

Workshop • June 13, 2017 • Arlington, VA

ted Latin American Citizens (LULAC)

vention & Exposition • July 4-8, 2017 • San Antonio, TX

mployed Women (FEW)

ning Program • July 17-20, 2017 • New Orleans, LA

ernment (BIG)

ning Institute • August 21-24, 2017 • Atlantic City, NJ

ge

ning Program • September 11-15, 2017 • Albuquerque, NM

ican Federal Executive Association (AAFEA)

nal Development Workshop • September 18-20, 2017 • College

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### **What's New on HRU?**



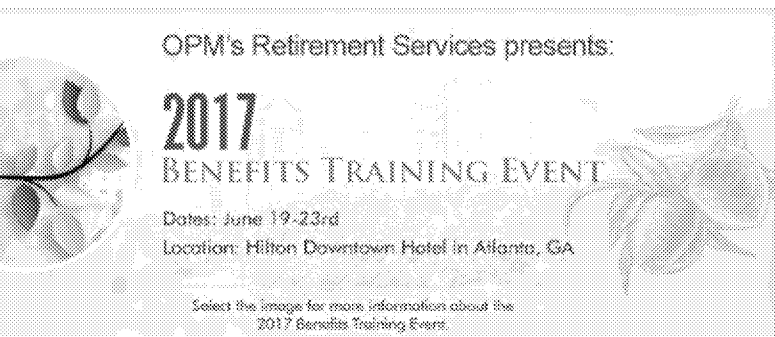
### **l Development Series (PDS) for Employee Relations**

**s**



Click Here for More Information  
Information visit: [http://hru.gov/course\\_catalog.aspx?cid=224&mgr=false](http://hru.gov/course_catalog.aspx?cid=224&mgr=false)

## l Benefits Training Event



rmation  
[www.opm.gov/course\\_catalog.aspx?cid=247&mgr=false](http://www.opm.gov/course_catalog.aspx?cid=247&mgr=false)

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### **UnlockTalent.gov – See What's New!**

d to announce the Agency Indicators page on [UnlockTalent.gov](http://UnlockTalent.gov) has  
Indicators page provides data related to the overall health of an  
enables you to pinpoint the strengths and weaknesses of your  
enhance decision making and create lasting sustainability.

#### **uded in this update?**

es on the page are organized into five sections consistent with the  
Human Capital Framework (HCF): workforce demographics, talent  
gement, performance management, strategic planning and  
nent, and evaluation.

dary pages are incorporated for each metric on the main page and  
le additional data breakouts.

at the Governmentwide level from the Federal Employee Viewpoint  
y (FEVS) and the Enterprise Human Resources Integration  
(I).

#### **ou look forward with future updates?**

community of Practice update – reorganizing the structure and content  
e page to make it more user-friendly and allow you to access  
nt easier and quicker.

ion of Agency level data to the Agency Indicators page - incorporate  
l Agency level data for the Departments/Large agencies for all  
es on the page

erly updates of the EHRI data

page, log-in to [www.UnlockTalent.gov](http://www.UnlockTalent.gov) and select the Agency  
k at the top. If you have not registered for the site, you can self-  
e site by going to [www.UnlockTalent.gov](http://www.UnlockTalent.gov) and selecting the Register  
right of the page.

y questions email [UnlockTalent@opm.gov](mailto:UnlockTalent@opm.gov).

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## **SES Leading Edge Programs**

### ***Leading Forum – \*New Date\* -- Registration still open!***

*Leading Forums* accelerate success of new senior executives in their first years of executive service and help them to “hit the ground running” during the transition into their enterprise leadership role.

#### ***Theme: Harnessing Your Business Acumen to Deliver Superior Public Value***

**Date:** **\*New Date\*** Monday, June 26, 2017 from 9 a.m. to 2 p.m. (was previously Wednesday, May 3, 2017).

**Location:** Partnership for Public Service, 1100 New York Avenue NW, Suite 200 East, Washington DC.

**Register:** [Click here](#) for more information on this Forum and to register. The underlying link is <https://cldcentral.usalearning.net/mod/page/view.php?id=22399>.

**Contact:** Please email [SES-Leading-EDGE@opm.gov](mailto:SES-Leading-EDGE@opm.gov) or call (434) 980-6278.

### ***SES Orientation Briefing, June 13–14, 2017 – Registration is open!***

The Personnel Management’s Federal Executive Institute conducts the government-wide *SES Orientation Briefings*. The June *SES Orientation Briefing* is an excellent addition to your SES onboarding program.

**Dates:** Tuesday, June 13, 2017 (9 a.m. to 4:30 p.m.) and Wednesday, June 14, 2017 (9 a.m. to 3 p.m.)

**Location:** Madison Auditorium, US Patent and Trademark Office, Alexandria, Virginia

**Register:** [Click here](#) for information about the SES Orientation Briefing and to register. The underlying link is <https://cldcentral.usalearning.net/mod/page/view.php?id=3897>.

**Contact:** Please email [SES-Orientation-Briefing@opm.gov](mailto:SES-Orientation-Briefing@opm.gov) or call (434) 980-6278.

*SES Orientation Briefings* and *SES Onboarding Forums* are components of the Senior Executive Development Portfolio, *SES Leading EDGE*, and are part of an enhanced executive onboarding model and government-wide onboarding framework. These programs also afford a unique opportunity to network with fellow Senior Executive colleagues from across the federal government.

For any general questions to [SES-Leading-EDGE@opm.gov](mailto:SES-Leading-EDGE@opm.gov) or call (434) 980-6278.

---

## Foundamentals of Human-Centered Design Workshop



U.S. Office of Personnel Management (OPM), the Lab at OPM is building human-centered design capacity across the Federal workforce. Join us for an introduction to human-centered design (HCD).

17 workshops:

For more information, visit the lab's new website [lab.opm.gov/class-sign-up/](http://lab.opm.gov/class-sign-up/)

---

### **JOB POSTINGS**

Agencies can send Job Announcements for HR/SES Positions to [chcoc@opm.gov](mailto:chcoc@opm.gov)

#### Federal Aviation Administration

*John Title:* Deputy Assistant Administrator for Human Resource Management

*Series & Grade:* EV-0340-02/02

*Position Information:* Full Time - Permanent

*Duty Location:* Washington, DC

*Open Period:* 05/31/2017-06/20/2017

[Read More...](#)

National Institutes of Health

*John Title: Director, Office of Human Resources*

*Series & Grade: ES-0201-00/00*

*Position Information: Full Time - Permanent*

*Duty Location: Bethesda, MD*

*Open Period: 05/30/17-06/29/17*

[Read More...](#)

*The CHCO bulletin is the primary means of disseminating pertinent and timely information to CHCOs on a wide range of Human Capital issues. The consolidated nature of this bulletin is meant to reduce the e-mail flow and streamline key communications. Each agency should ensure they are getting all information contained in the weekly bulletin. If you have any comments, suggestions or questions on the bulletin or its contents, please feel free to contact [chcoc@opm.gov](mailto:chcoc@opm.gov)*

**Contact us:**

Chief Human Capital Officers Council

1900 E Street, NW

Washington, DC 20415

202.606.1722

[chcoc@opm.gov](mailto:chcoc@opm.gov)

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**From:** Gantt, Melissa  
**Location:** DCRoomARN3330/DC-AR-OARM  
**Importance:** Normal  
**Subject:** VERA/VSIP  
**Start Date/Time:** Wed 6/14/2017 3:00:00 PM  
**End Date/Time:** Wed 6/14/2017 3:30:00 PM

Meeting requested by Ms. Vizian. 13 Jun/1700/mag

Teleconference Number Ex. 6 - Personal Privacy Conference Code: Ex. 6 - Personal Privacy

**To:** Carpenter, Wesley[Carpenter.Wesley@epa.gov]  
**From:** Cooper, Marian  
**Sent:** Tue 8/8/2017 11:24:42 AM  
**Subject:** RE: HQs Off-boarding - Second One Stop Day Added

And you have people to staff it, right?

Marian Pechmann Cooper

Chief of Staff

Office of Administration and Resources Management

William Jefferson Clinton Federal Building-NORTH (3330)

Washington, DC 20460

office number -- 202 564-0620

office fax -- 202 564-0233



**From:** Carpenter, Wesley  
**Sent:** Monday, August 07, 2017 5:04 PM  
**To:** Vizian, Donna <Vizian.Donna@epa.gov>; Showman, John <Showman.John@epa.gov>  
**Cc:** Gray, Linda <gray.linda@epa.gov>; Hitchens, Lynnann <hitchens.lynnann@epa.gov>; Noga, Vaughn <Noga.Vaughn@EPA.GOV>; Petrole, Maryann <Petrole.Maryann@epa.gov>; Hardy, Michael <Hardy.Michael@epa.gov>; Jablonski, Janice <jablonski.janice@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>; Ack, David <Ack.David@epa.gov>  
**Subject:** FW: HQs Off-boarding - Second One Stop Day Added  
**Importance:** High

Donna/John:



As a follow-up to our discussion at last week's HR meeting, we are planning on having two HQs off-boarding days – August 23 and 30 – for the employees departing the agency as part of the latest VERA/VSIP. Please let me know if you have any questions. Thanks.

Wes

**From:** Ack, David

**Sent:** Monday, August 07, 2017 11:57 AM

**To:** Glazier, Kelly <[Glazier.Kelly@epa.gov](mailto:Glazier.Kelly@epa.gov)>; Jefferson, Gayle <[Jefferson.Gayle@epa.gov](mailto:Jefferson.Gayle@epa.gov)>; Cox, Andrew <[Cox.Andrew@epa.gov](mailto:Cox.Andrew@epa.gov)>; Kelty, Diane <[Kelty.Diane@epa.gov](mailto:Kelty.Diane@epa.gov)>; Cunningham, Dennis <[Cunningham.Dennis@epa.gov](mailto:Cunningham.Dennis@epa.gov)>; Mobashar, Mutahara <[mobashar.mutahara@epa.gov](mailto:mobashar.mutahara@epa.gov)>; Hardy, Michael <[Hardy.Michael@epa.gov](mailto:Hardy.Michael@epa.gov)>

**Cc:** OARM Directors <[OARM\\_Directors@epa.gov](mailto:OARM_Directors@epa.gov)>

**Subject:** Second One Stop Day Added

**Importance:** High

All,

After receiving some feedback and recommendations, OARM has added a second all-day one stop employee separation event for Wednesday, August 30, 2017. Time is 8:00-5:30pm and I am in the process of securing a location. **If your office has a suitable space, please reserve it and let me know**, I would appreciate it. We will again need representatives from the Badging Office, Security (NSI Debrief and Credentials), Facilities, Transit Subsidy/Parking Subsidy/Parking Passes, SHEM, OITA (for passports) and the library. Please ensure that individuals from your organization have the appropriate authority to sign are available to participate in this event.

Staff should bring a printed form 3110-1 which they will need to email to [hrpayhelp@epa.gov](mailto:hrpayhelp@epa.gov) to check the status of their leave balances, purchase cards and any other debts. They should email the form to [cinwd\\_travel@epa.gov](mailto:cinwd_travel@epa.gov) to terminate their travel card and ensure balances are zero.

We are expecting a representative from OITA for anyone that has passports, but be advised, staff with passports may have to report directly to OITA due to the sensitive nature and control procedures for passports. Please identify staff that will be able to be on hand to cover the entire day. I will be setting up a short meeting to go over the details with them. Please submit the names of your staff that will be

supporting this event to [ack.david@epa.gov](mailto:ack.david@epa.gov) by **COB Friday, August 18<sup>th</sup>**.

There will be a meeting on Tuesday, August 22 at 9:00am in the WJCS 2138 for all participants for the One Stop events. This meeting should last no more than 30 minutes to discuss the procedures for the One Stop days.

Regards,

**David B. Ack,** MPA

Business Process Improvement Coordinator

Lean Six Sigma Master Black Belt/OARM Lean Advocate

Office of Administration and Resources Management

Office of Resources, Operations and Management I/O

U.S. Environmental Protection Agency WJCN 3353H

1200 Pennsylvania Avenue NW

Washington, DC 20460

202-564-2885 ( o )

Ex. 6 - Personal Privacy ( C )

"A gentleman never makes himself the center of attention. His goal is to make life easier, not just for himself but for his friends, his acquaintances, and the world at large. Because he is a gentleman, he does not consider this a burden. Instead, it is a challenge he faces eagerly everyday."

Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 6/13/2017 2:26:10 PM  
**To:** Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**CC:** Hunt, Loretta [Hunt.Loretta@epa.gov]; Parker, Gary [parker.gary@epa.gov]  
**Subject:** Anticipated date to send informal V/V package over for OPM/OMB review--

**Importance:** High

**Ex. 5 - Deliberative Process**

Let us know if

questions. Thanks. DH

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

Message

---

**From:** Schulman, Marvin [Schulman.Marvin@epa.gov]  
**Sent:** 6/19/2017 2:40:45 PM  
**To:** Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** RE: FYI--Draft final V/V submission is now delivered--

Linda & Wes –

Just now seeing Debi's email...Its worth pointing out that Debbi left out one team member – herself! She was working just as hard on this as any of us, and was pivotal in keeping us all on task in getting this done.

---

**From:** Gray, Linda  
**Sent:** Saturday, June 17, 2017 9:15 AM  
**To:** Hunt, Loretta <Hunt.Loretta@epa.gov>; Schulman, Marvin <Schulman.Marvin@epa.gov>; McNeal, Detha <McNeal.Detha@epa.gov>; Kuhns, Jason <Kuhns.Jason@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>  
**Cc:** Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Showman, John <Showman.John@epa.gov>  
**Subject:** Fwd: FYI--Draft final V/V submission is now delivered--

Great team effort. Have a great weekend!

Sent from my iPhone

Begin forwarded message:

**From:** "Carpenter, Wesley" <Carpenter.Wesley@epa.gov>  
**Date:** June 16, 2017 at 8:25:26 PM EDT  
**To:** "Hart, Debbi" <Hart.Debbi@epa.gov>  
**Cc:** "Vizian, Donna" <Vizian.Donna@epa.gov>, "Showman, John" <Showman.John@epa.gov>, "Gray, Linda" <gray.linda@epa.gov>, "Cooper, Marian" <Cooper.Marian@epa.gov>  
**Subject:** Re: FYI--Draft final V/V submission is now delivered--

Thanks, Debbi (Loretta, Marvin, Detha, Jason, Gary and Marian). Truly an outstanding team achievement. Well done!!! Enjoy your weekend and get some rest.

Wes

Sent from my iPhone

On Jun 16, 2017, at 7:31 PM, Hart, Debbi <Hart.Debbi@epa.gov> wrote:

It's now 7:30.

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

Despite the stress and frustration, couldn't ask for a better team. Shout outs to Marvin, Detha, Jason and Loretta- they continue to be awesome.

HELLO WEEKEND!

Message

---

**From:** Gray, Linda [gray.linda@epa.gov]  
**Sent:** 6/17/2017 1:14:41 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]; Schulman, Marvin [Schulman.Marvin@epa.gov]; McNeal, Detha [McNeal.Detha@epa.gov]; Kuhns, Jason [Kuhns.Jason@epa.gov]; Parker, Gary [parker.gary@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]  
**CC:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]  
**Subject:** Fwd: FYI--Draft final V/V submission is now delivered--

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Sent from my iPhone

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**Date:** June 16, 2017 at 8:25:26 PM EDT  
**To:** "Hart, Debbi" <Hart.Debbi@epa.gov>  
**Cc:** "Vizian, Donna" <Vizian.Donna@epa.gov>, "Showman, John" <Showman.John@epa.gov>, "Gray, Linda" <gray.linda@epa.gov>, "Cooper, Marian" <Cooper.Marian@epa.gov>  
**Subject:** Re: FYI--Draft final V/V submission is now delivered--

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**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

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HELLO WEEKEND!

Message

---

**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 6/5/2017 9:57:27 PM  
**To:** 2017HQfirstassistants [2017HQfirstassistants@epa.gov]; 2017Regionfirstassistants [2017Regionfirstassistants@epa.gov]  
**CC:** DAA-Career [DAACareer@epa.gov]; DRA [DRA@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** Final V/V submissions - need by COB tomorrow

Hi Everyone. A thanks to you and your staff for all the hard work on the V/V submissions. We are crunching to get our agency-wide plan completed, so please send Debbi any changes you need to make to your submission by COB tomorrow. Thanks again. Donna

## Message

**From:** This Week @ EPA [epanews@epa.gov]  
**Sent:** 6/5/2017 4:10:25 PM  
**To:** This Week @ EPA [epanews@epa.gov]  
**Subject:** This Week @ EPA - June 5, 2017

**Importance:** High



June 5, 2017

Banner image taken by David S. Burden of ORD at Arbuckle Lake in Oklahoma

[Senior Leadership Message](#) | [Hot Topics](#) | [Key Dates](#) | [Video Spotlight](#) | [Health & Wellness](#) | [IT Corner](#)

## Senior Leadership Message

In case you missed it, Acting Deputy Administrator Mike Flynn sent out a mass mailer on June 1, titled [Agency's Workforce Shaping through Voluntary Early Retirement and Separation Incentive Payment Authorities \(VERA/VSIP\)](#). Be sure to check it out.

## Hot Topics

**Learn how one EPA office puts its EVS data to work**



What happens after you take the Office of Personnel Management's (OPM) Employee Viewpoint Survey (EVS)? Linda Gerber explains how the Office of Land and Emergency Management (OLEM) dives deeper into EVS results to find out what employees really want. 'Turns out that it might be what management wants as well. Read more about OLEM management's efforts to understand its EVS results and improve communication with staff on their [Engaged EPA](#) blog post, [Ask Before You Act](#).

Let your voice be heard! OPM extended the deadline for completing the survey to **June 15**.



**June is Employee Wellbeing Month**

Employee Wellbeing Month spotlights the role of the workplace in helping to create, healthier, happier employees.

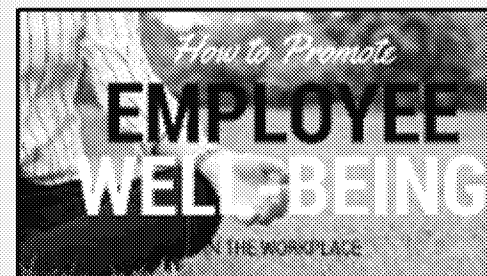
Join Dr. Jessica Unick, Ph.D., Assistant Professor (Research) at Brown University Medical School, and Leslie Curtis, M.A., Director, Weight-control Information Network, National Institutes of Health (NIH), on June 6, from 1 p.m.- 2 p.m. EDT, for a webinar entitled *Physical Activity: Making Sense of Current Research, Persistent Myths, and Common Barriers*.

Participants will gain a better understanding of current physical activity research, guidelines, myths, and sample strategies to overcome roadblocks to physical activity. Following the webinar, attendees should be able to identify free physical activity tools and resources from the NIH and other organizations.

**To Register:** Select the following link [\*Physical Activity: Making Sense of Current Research, Persistent Myths, and Common Barriers\*](#)

People needing a reasonable accommodation should contact [Amanda Sweda](#) at (202) 566-0678. Questions about this presentation can be directed to [Christina Hines](#) at (202) 566-1989.

Please mark your calendar and plan to participate.  [ADD TO CALENDAR](#)



## Retirement planning information

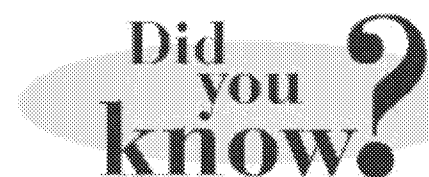
The U.S. Office of Personnel Management has released a new video to help you learn about your annuity benefits under the two most common Federal retirement systems: the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS).

The new 51-minute video, *Your Federal Retirement Annuity – CSRS and FERS*, can help you understand:

- Which is my retirement system?
- How much of my salary is contributed to my retirement system?
- When can I retire?
- What service is creditable toward my retirement eligibility and annuity benefit?
- How can I estimate my monthly annuity benefit?
- What reductions could apply to my annuity benefit?
- How can I prepare for retirement?

See the [video and other retirement planning information](#) to help you plan for retirement.

Employees can direct questions about their annuity benefits to their [Benefits Specialist](#).



Upcoming annual 'Conversation with Scientific Integrity Official'

The EPA Scientific Integrity Program will host its Annual Employee Conversation with the Scientific Integrity Official on June 6, from 3:30-4:30 p.m. EDT. Employees, grantees, fellows, contractors, and interns are invited to join the Scientific Integrity Official, Francesca T. Grifo, to hear about scientific integrity updates and ask questions.

Scientific  
Integrity

EPA's Whistleblower Protection Ombudsman, Steve Alderton, will also be joining the conversation to discuss his role and share information related to the Whistleblower Protection Enhancement Act. Washington, D.C. area employees can participate in person at the William Jefferson Clinton North building, Room 5020. Employees who are not located in the D.C. area can participate via Adobe Connect at <http://epawebconferencing.acms.com/annualconversationsci/>.

## Key Dates

## Video Spotlight



Click on each event below to get more details. Click on the "Add to Calendar" button to add an event to your Outlook calendar. If you see a log-in screen, please click on your EPA email, or if prompted, enter your email and network password.

### Happening This Week:

**June 6:** [Webinar -- Physical Activity: Make Sense of Current Research, Persistent Myths, and Common Barriers](#)

ADD TO CALENDAR

**June 6:** [Annual Conversation with the Scientific Integrity Official](#)

ADD TO CALENDAR

**June 7:** [Continuing Life Insurance into Retirement webinar](#)

ADD TO CALENDAR

**June 8:** [Protecting your Retirement with a Plan for Long Term Care webinar by Federal Long Term Care Partners \(Part 2 of 2\)](#)

ADD TO CALENDAR

### Coming Soon:

**June 20:** [Workers' Compensation Presentation for EPA Supervisors and Managers](#)

ADD TO CALENDAR

**June 21:** [LGBTQ issues in the workplace webinar](#)

ADD TO CALENDAR

### The Library of Congress is your library

The Library of Congress was established by an act of Congress in 1800, when our nation's capital was moved from Philadelphia to Washington, D.C. The Library of Congress is grand and inspiring, but you don't have to go there to search the treasures of the institution. The Library's website offers millions of digitized items, all for free and without registration.



(Video length: 4:54)

## Health & Wellness

## IT Corner

### June is National Safety Month

### Introducing new SharePoint Features App

The launch of a new application aims to help EPA employees take a comprehensive look at the many features available to them in SharePoint. The **SharePoint Features Application**

provides all users an enhanced view of the available and upcoming features and components of SharePoint Online.



A user-friendly interface allows you to view features by the following categories:

- Available
- Coming Soon

National Safety Month is a nationwide

- Previously Released
- Removed Features

You can filter the list further using the following selections:

- Audience (i.e., who the feature is intended for)
- Feature Scope (i.e., whether the feature is available for all in the SharePoint environment, available per site collection, or available per site)
- Feature Type (e.g., content, search, etc.)

Test the app yourself by going to the [SharePoint Program Management site](#) and choosing **Features** in the left navigation bar. You can also bookmark the [SharePoint Features App](#) for easy access.

The Office of Environmental Information plans to add additional resources to the app as they come available to users.

awareness campaign that focuses on reducing the leading causes of injury at work, on the road, and in homes and communities. Our Safety and Sustainability Division (SSD) does a number of things to create a healthy and safe workplace, including:

1. SSD administers the Injury and Illness Prevention Program, which aims to decrease employee injuries and illnesses agency-wide, leading to increased employee awareness of reporting injuries, illnesses, and near misses in their workplace. ;
2. Managing the SSD Safety intranet site, which has three sections: Specific Safety Issues, Workplace Safety Documents, and Additional Resources; and
3. Publishing the Wellness Quarterly newsletter.

For questions on EPA's safety programs, please contact Josh McDonald of SSD's Environmental, Safety and Health Programs Branch at (202) 564-6816.

We would love to hear your feedback about this newsletter. Please contact us at: [internalcomms@epa.gov](mailto:internalcomms@epa.gov) | <http://intranet.epa.gov/internalcomms>  
Looking for previous editions of the Newsletter? Go to the [Newsletter Archive](#)

Message

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**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 6/20/2017 12:56:17 AM  
**To:** Coomber, Robert [coomber.robert@epa.gov]; Corbett, Krysti [Corbett.Krysti@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]; Showman, John [Showman.John@epa.gov]  
**Subject:** V/V

We received the ok on the communication material. I will send it first thing tomorrow to the first assistants. I need to see when internal comms will send out.

Message

---

**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 6/19/2017 4:29:53 PM  
**To:** McNeal, Detha [McNeal.Detha@epa.gov]; Kuhns, Jason [Kuhns.Jason@epa.gov]; Parker, Gary [parker.gary@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]; Schulman, Marvin [Schulman.Marvin@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]  
**CC:** Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** Thank you

Hi Everyone,

A quick note to say thank you for all your hard work to deliver the draft V/V package AHEAD of schedule. I really appreciate it.

Best,  
Donna



Message

---

**From:** Burbach, Joseph [burbach.joseph@epa.gov]  
**Sent:** 7/31/2017 3:03:00 PM  
**To:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Gray, Linda [gray.linda@epa.gov]  
**Subject:** Recap of OHR Workgroup Meetings  
**Attachments:** OHR Workgroup Projects - Status Updates.docx

Linda/Wes

Please find attached a summary of my meetings last week with the various OHR employee project workgroups.

As you will note, some are nearing completion of project and others are still working through.

We can arrange another round of updates next month or sooner for those who finalize and need approval to proceed.

Thanks

**Joseph Burbach**  
Senior Advisor  
Office of Human Resources  
U.S. Environmental Protection Agency  
(202) 564-7783

Message

---

**From:** Corbett, Krysti [Corbett.Krysti@epa.gov]  
**Sent:** 4/19/2017 8:40:40 PM  
**To:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Gray, Linda [gray.linda@epa.gov]  
**CC:** Patterson, Nicole [Patterson.Nicole@epa.gov]; Coomber, Robert [coomber.robert@epa.gov]  
**Subject:** VERA/VSIP Union Briefing

Wes and Linda,

Several AAs are scheduling meetings with all employees to discuss the potential VERA/VSIP and discussing the agency's requirement regarding workforce planning. We have received several questions from the unions regarding this

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

---

**Krysti Corbett**

Director  
Labor and Employee Relations Division  
Office of Human Resources  
U.S. Environmental Protection Agency  
1200 Pennsylvania Avenue, N.W.  
WJC North 6317A  
Washington DC 20460  
Mail Code 3602A  
Desk Phone: (202) 564-6295  
Mobile: **Ex. 6 - Personal Privacy**  
[corbett.krysti@epa.gov](mailto:corbett.krysti@epa.gov)

Message

---

**From:** Gray, Linda [gray.linda@epa.gov]  
**Sent:** 4/19/2017 5:58:06 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]  
**CC:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Burbach, Joseph [burbach.joseph@epa.gov]  
**Subject:** FW: EPA To Offer Employees Buyouts, Early Retirement This Year

**Linda R. Gray**

Director, Office of Human Resources  
Office of Administration and Resources Management  
Environmental Protection Agency  
(202) 564-4606 phone  
(202) 564-4613 fax

---

**From:** GovExec Breaking News [mailto:news@e.govexec.com]  
**Sent:** Wednesday, April 19, 2017 1:41 PM  
**To:** Gray, Linda <gray.linda@epa.gov>  
**Subject:** EPA To Offer Employees Buyouts, Early Retirement This Year



**GovExec Breaking News**  
April 19, 2017

Problems viewing? [View as a web page](#)



---

**EPA To Offer Employees Buyouts, Early Retirement This Year // Eric Katz**

The Environmental Protection Agency will begin offering employees financial incentives to leave the agency this year, according to an internal memorandum obtained by *Government Executive*.

[Click here to read the entire story.](#)

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[Nextgov iPhone App](#)  
[Nextgov Cybersecurity iPhone App](#)  
[Defense One iPhone App](#)  
[Route Fifty iPhone App](#)  
[GovExec and Nextgov Newsletters](#)

Defense One Newsletter

Route Fifty Newsletter

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This message was sent from Government Executive to [gray.linda@epa.gov](mailto:gray.linda@epa.gov). You have been sent GovExec Breaking News because you have opted in to receive it. Note: It may take our system up to two business days to process your unsubscribe request and during that time you may receive one or two more newsletters. Thank you for reading GovExec Breaking News.



Government Executive Media Group, 600 New Hampshire Avenue NW, Washington, DC 20037

Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 5/9/2017 11:15:05 PM  
**To:** Gray, Linda [gray.linda@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** RE: Meeting with the first assistants tomorrow

Linda and Wes-

My understanding is this is about V/V and after I heard everything at the ARA call today, I would like to listen in. But this conflicts with our lunch tomorrow. What are your thoughts?

---

**From:** Vizian, Donna  
**Sent:** Tuesday, May 09, 2017 6:44 PM  
**To:** Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>  
**Subject:** Meeting with the first assistants tomorrow

HI – I think it would be good if you join me at the First Assistants meeting tomorrow. It is at noon in the big conference room. thanks

Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 5/9/2017 8:51:10 PM  
**To:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** RE: ARA V-V Conference Call

BTW, thanks for your support.

---

**From:** Carpenter, Wesley  
**Sent:** Tuesday, May 09, 2017 12:54 PM  
**To:** Hart, Debbi <Hart.Debbi@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>  
**Cc:** Gray, Linda <gray.linda@epa.gov>  
**Subject:** ARA V-V Conference Call

Debbi/Loretta:

I participated in the meeting via conference call. Great job in providing the ARAs/HROs/PMOs the latest status, next steps, and of course answering the numerous questions.

Wesley J. Carpenter  
Deputy Director, EPA's Office of Human Resources  
Tel. No.: 202-564-2019  
Cell Phone: Ex. 6 - Personal Privacy  
E-mail: [carpenter.wesley@epa.gov](mailto:carpenter.wesley@epa.gov)

Message

---

**From:** Cooper, Marian [Cooper.Marian@epa.gov]  
**Sent:** 3/28/2017 4:37:32 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]; Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Bell, Matthew [Bell.Matthew@epa.gov]  
**Subject:** Workforce Reshaping VERA VSIP March 28.2017.docx  
**Attachments:** Workforce Reshaping VERA VSIP March 28.2017.docx

This version has a couple of very minor edits.

Thank you!

Marian

Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 4/18/2017 12:01:48 PM  
**To:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** LMS update--

Is that still on? What time? Or is it being taken over by V/V? D



**To:** Gray, Linda[gray.linda@epa.gov]  
**Cc:** Carpenter, Wesley[Carpenter.Wesley@epa.gov]  
**From:** Coogan, Daniel  
**Sent:** Tue 3/28/2017 12:21:15 PM  
**Subject:** RE: FY18activity\_HumanResources 3-28-17.docx  
FY18activity\_HumanResources.docx

Thank you. Attached is the updated version.

Dan

Director, Resources, Analysis and Planning Division

Office of Resources, Operations and Management, OARM

o: 202-564-1862

C: Ex. 6 - Personal Privacy

OARM Budget SharePoint Site

**From:** Gray, Linda  
**Sent:** Tuesday, March 28, 2017 8:12 AM  
**To:** Coogan, Daniel <Coogan.Daniel@epa.gov>  
**Cc:** Carpenter, Wesley <Carpenter.Wesley@epa.gov>  
**Subject:** FY18activity\_HumanResources 3-28-17.docx

Dan,

Here are our updated changes.

**Ex. 5 - Deliberative Process**

## **Ex. 5 - Deliberative Process**

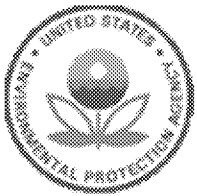
Message

---

**From:** Cooper, Marian [Cooper.Marian@epa.gov]  
**Sent:** 3/27/2017 2:26:10 PM  
**To:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** RE: Furlough & Reassignment Fact Sheets

I will change the number

Marian Pechmann Cooper  
Chief of Staff  
Office of Administration and Resources Management  
William Jefferson Clinton Federal Building-NORTH (3330)  
Washington, DC 20460  
office number -- 202 564-0620  
office fax -- 202 564-0233



---

**From:** Carpenter, Wesley  
**Sent:** Friday, March 24, 2017 3:32 PM  
**To:** Cooper, Marian <Cooper.Marian@epa.gov>  
**Cc:** Gray, Linda <gray.linda@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>  
**Subject:** Furlough & Reassignment Fact Sheets

Marian:

Here are the fact sheets on furloughs and reassignments for the upcoming EMC. The VERA/VSIP was already provided last night. Please let me know if you have any questions or need additional information. Thanks.

Wes

## Appointment

---

**From:** Wheeler, Kimberly [Wheeler.Kimberly@epa.gov]  
**Sent:** 5/11/2017 12:20:06 PM  
**To:** Hardy, Michael [Hardy.Michael@epa.gov]; Petrole, Maryann [Petrole.Maryann@epa.gov]; Legare, Pamela [Legare.Pamela@epa.gov]; Carpenter, Wesley [Carpenter.Wesley@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Franklin, Bruce [Franklin.Bruce@epa.gov]; Ward, Mary-Beth [Ward.Mary-Beth@epa.gov]; Scola, Jennifer [Scola.Jennifer@epa.gov]; Collins, BJ [Collins.BJ@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]; Bell, Matthew [Bell.Matthew@epa.gov]; Neal, Kerry [neal.kerry@epa.gov]  
**CC:** Avila, Aaron [avila.aaron@epa.gov]; Settle, Steve [Settle.Steve@epa.gov]; Lemley, Lauren [Lemley.Lauren@epa.gov]  
**Subject:** OARM Deputies Meeting (Agenda attached)  
**Attachments:** Deputy Meeting Agenda for May.docx  
**Location:** DCRoomARN3330/DC-AR-OARM  
  
**Start:** 5/11/2017 2:30:00 PM  
**End:** 5/11/2017 3:30:00 PM  
**Show Time As:** Tentative  
  
**Recurrence:** Monthly  
the first Thursday of every 1 month(s) from 10:30 AM to 11:30 AM

Message

---

**From:** Gray, Linda [gray.linda@epa.gov]  
**Sent:** 5/5/2017 6:01:25 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]  
**CC:** Carpenter, Wesley [Carpenter.Wesley@epa.gov]  
**Subject:** FW: ARA-OARM Call

**Linda R. Gray**

Director, Office of Human Resources  
Office of Administration and Resources Management  
Environmental Protection Agency  
(202) 564-4606 phone  
(202) 564-4613 fax

---

**From:** Hardy, Michael  
**Sent:** Friday, May 05, 2017 1:59 PM  
**To:** Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Polk, Denise <Polk.Denise@epa.gov>; Patrick, Kimberly <Patrick.Kimberly@epa.gov>; Neal, Kerry <neal.kerry@epa.gov>; Legare, Pamela <Legare.Pamela@epa.gov>; Noga, Vaughn <Noga.Vaughn@EPA.GOV>; Petrole, Maryann <Petrole.Maryann@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>; Collins, BJ <Collins.BJ@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>; Scola, Jennifer <Scola.Jennifer@epa.gov>  
**Subject:** RE: ARA-OARM Call

Good afternoon,

Andrea Westenberger has requested VERA/VSIP as an agenda topic for the upcoming ARA-OARM call on 5/16. Are there other agenda topics for consideration?

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work  

Ex. 6 - Personal Privacy

 - Cell

-----Original Appointment-----

**From:** Westenberger, Andrea  
**Sent:** Monday, April 24, 2017 1:28 PM  
**To:** Westenberger, Andrea; ARA; Showman, John; Hitchens, Lynnann; Hardy, Michael  
**Cc:** Deputy ARAs; Gray, Linda; Carpenter, Wesley; Polk, Denise; Neal, Kerry; Patrick, Kimberly; Legare, Pamela; Brown, Dawn; Noga, Vaughn; Petrole, Maryann; Blankenship, Steven; Jackson, Raphael; Helm, Arron; Collins, BJ; Carter, Rick; Benjamin-Sirmons, Denise; Kelty, Diane; Cox, Andrew; McMichael, Nate; Bonnell, Corey; McFarland, Verne; Nelson, Thomas; Doucette, Judi; Battin, Andrew; Brookshire, Malena; Conklin, Jeanne; Dubbs, Kimberly; Hill, Robert; Jones, Quentin; Jones-Peeler, Meshell; OBrien, Kathy; Osborne, Howard; Soward, Ruth-Alene; Terris, Carol; Walsh, Ed; Williams, Maria

**Subject:** ARA-OARM Call

**When:** Tuesday, May 16, 2017 8:30 AM-9:30 AM (UTC-08:00) Pacific Time (US & Canada).

**Where:** **Ex. 6 - Personal Privacy**

ARA-OARM Call

Tuesday, 5/16, 8:30 am – 9:30 PST

**Ex. 6 - Personal Privacy**

*Note: To reduce costs, please call the 1-866 number in groups as we are charged per line/per minute.*

[Join Skype Meeting](#)

Topic #	Topic Title & Purpose	Materials	Presenter(s)/Office	Time (PST)
1	Roll Call		Andrea Westenberger (Region 10 LRC)	8:30 – 8:35 (5 min)
2	TBD			

### Upcoming ARA Calls

Tuesdays, 8:30 am – 9:30 PST

- May 9: ARA-OCFO
- May 16: ARA-OARM
- May 23: ARA-OEI
- May 31 (Wednesday): ARAs-Only (Optional)
- June 6: ARA-Only VTC
- June 13: ARA-OCFO
- June 27: ARA-OEI

For questions or agenda items, please contact Andrea Westenberger, Lynnnann Hitchens, and Michael Hardy.

Message

---

**From:** Carpenter, Wesley [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D84F6AA679F24F03990D7C6EB5CA0CAA-WCARPENT]  
**Sent:** 7/31/2017 6:39:56 PM  
**To:** Gantt, Melissa [Gantt.Melissa@epa.gov]; Wheeler, Kimberly [Wheeler.Kimberly@epa.gov]  
**CC:** Vizian, Donna [Vizian.Donna@epa.gov]; Showman, John [Showman.John@epa.gov]; Gray, Linda [gray.linda@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Subject:** Additional Agenda Items for HR Weekly Meeting Tomorrow

Melissa/Kim:

Please add the following agenda items to those provided last week:

- HRC Meeting Preparations
- V/V Off-boarding at HQs
- 2016 National Honor Awards

Please remove the following agenda item I provided last week:

- Summer Interns/Volunteers Event

Please let me know if you have any questions. Thanks.

Wesley J. Carpenter  
Deputy Director, EPA's Office of Human Resources  
Tel. No.: 202-564-2019  
Cell Phone: **Ex. 6 - Personal Privacy**  
E-mail: carpenter.wesley@epa.gov

Message

---

**From:** Carpenter, Wesley [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D84F6AA679F24F03990D7C6EB5CA0CAA-WCARPENT]  
**Sent:** 5/8/2017 11:07:15 AM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]  
**CC:** Gray, Linda [gray.linda@epa.gov]  
**Subject:** FW: ARA-OARM Call

Debbi/Loretta:

Good morning. FYI – VERA/VSIP may be on the ARA Call agenda on May 16.

Wes

---

**From:** Hardy, Michael  
**Sent:** Friday, May 05, 2017 2:00 PM  
**To:** Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Polk, Denise <Polk.Denise@epa.gov>; Patrick, Kimberly <Patrick.Kimberly@epa.gov>; Neal, Kerry <neal.kerry@epa.gov>; Legare, Pamela <Legare.Pamela@epa.gov>; Noga, Vaughn <Noga.Vaughn@EPA.GOV>; Petrole, Maryann <Petrole.Maryann@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>; Collins, BJ <Collins.BJ@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>; Scola, Jennifer <Scola.Jennifer@epa.gov>  
**Subject:** RE: ARA-OARM Call

As well as the SEE Telework discussion...

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work  

Ex. 6 - Personal Privacy

 - Cell

---

**From:** Hardy, Michael  
**Sent:** Friday, May 05, 2017 1:59 PM  
**To:** Gray, Linda <gray.linda@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Polk, Denise <Polk.Denise@epa.gov>; Patrick, Kimberly <Patrick.Kimberly@epa.gov>; Neal, Kerry <neal.kerry@epa.gov>; Legare, Pamela <Legare.Pamela@epa.gov>; Noga, Vaughn <Noga.Vaughn@EPA.GOV>; MaryAnn Petrole <Petrole.MaryAnn@epa.gov>; Helm, Arron <Helm.Arron@epa.gov>; Collins, BJ <Collins.BJ@epa.gov>; Carter, Rick <Carter.Rick@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>; Cooper, Marian <Cooper.Marian@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>; Scola, Jennifer <Scola.Jennifer@epa.gov>  
**Subject:** RE: ARA-OARM Call

Good afternoon,

Andrea Westenberger has requested VERA/VSIP as an agenda topic for the upcoming ARA-OARM call on 5/16. Are there other agenda topics for consideration?

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work

Ex. 6 - Personal Privacy - Cell

-----Original Appointment-----

**From:** Westenberger, Andrea

**Sent:** Monday, April 24, 2017 1:28 PM

**To:** Westenberger, Andrea; ARA; Showman, John; Hitchens, Lynnann; Hardy, Michael

**Cc:** Deputy ARAs; Gray, Linda; Carpenter, Wesley; Polk, Denise; Neal, Kerry; Patrick, Kimberly; Legare, Pamela; Brown, Dawn; Noga, Vaughn; Petrole, Maryann; Blankenship, Steven; Jackson, Raphael; Helm, Arron; Collins, BJ; Carter, Rick; Benjamin-Sirmons, Denise; Kelty, Diane; Cox, Andrew; McMichael, Nate; Bonnell, Corey; McFarland, Verne; Nelson, Thomas; Doucette, Judi; Battin, Andrew; Brookshire, Malena; Conklin, Jeanne; Dubbs, Kimberly; Hill, Robert; Jones, Quentin; Jones-Peeler, Meshell; OBrien, Kathy; Osborne, Howard; Soward, Ruth-Alene; Terris, Carol; Walsh, Ed; Williams, Maria

**Subject:** ARA-OARM Call

**When:** Tuesday, May 16, 2017 8:30 AM-9:30 AM (UTC-08:00) Pacific Time (US & Canada).

**Where:** Ex. 6 - Personal Privacy

ARA-OARM Call

Tuesday, 5/16, 8:30 am – 9:30 PST

## Ex. 6 - Personal Privacy

*Note: To reduce costs, please call the 1-866 number in groups as we are charged per line/per minute.*

[Join Skype Meeting](#)

Topic #	Topic Title & Purpose	Materials	Presenter(s)/Office	Time (PST)
1	Roll Call		Andrea Westenberger (Region 10 LRC)	8:30 – 8:35 (5 min)
2	TBD			

## Upcoming ARA Calls

Tuesdays, 8:30 am – 9:30 PST

- May 9: ARA-OCFO
- May 16: ARA-OARM
- May 23: ARA-OEI
- May 31 (Wednesday): ARAs-Only (Optional)
- June 6: ARA-Only VTC
- June 13: ARA-OCFO
- June 27: ARA-OEI

For questions or agenda items, please contact Andrea Westenberger, Lynnann Hitchens, and Michael Hardy.





Message

---

**From:** Carpenter, Wesley [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=D84F6AA679F24F03990D7C6EB5CA0CAA-WCARPENT]  
**Sent:** 5/5/2017 12:25:55 PM  
**To:** Gray, Linda [gray.linda@epa.gov]  
**Subject:** RE: Draft Agenda for OHR Managers Meeting on May 10, 2017

Linda:

Sounds good. We can remove some of the items if we run into a time crunch.

Wes

---

**From:** Gray, Linda  
**Sent:** Friday, May 05, 2017 8:24 AM  
**To:** Carpenter, Wesley <Carpenter.Wesley@epa.gov>  
**Subject:** RE: Draft Agenda for OHR Managers Meeting on May 10, 2017

Wes,

I will send a note to the team to start at 8:30. The assessment follow up may take an hour. I can probably cut to 45 minutes. Also, can have Joann do 45 minutes for the tour. We want to get to lunch by 11:45 in order to get back over to help with ice cream by 1/1:15.

**Linda R. Gray**  
Director, Office of Human Resources  
Office of Administration and Resources Management  
Environmental Protection Agency  
(202) 564-4606 phone  
(202) 564-4613 fax

---

**From:** Carpenter, Wesley  
**Sent:** Friday, May 05, 2017 6:11 AM  
**To:** Gray, Linda <gray.linda@epa.gov>  
**Subject:** Draft Agenda for OHR Managers Meeting on May 10, 2017

Linda:

Good morning. As a follow-up to our brief discussion yesterday, I am recommending the following agenda items for our managers meeting on May 10:

- Welcome & Opening Remarks – Linda
- Survey Results – Linda/Wendy
- Workforce Reshaping/Restructuring Follow-up – VERA/VSIP, Performance Plan – Linda/Wes
- Strategic Plan/Paper Discussion – Joe/Wes
- Contracts Update – Wes/Wendy/Terrence
- 2017 OARM Honor Awards – Wes
- PIC Tour – Joanne Amorosi
- Lunch – All OHR Managers (TBD)
- OARM Ice Cream Social – All OHR Managers

Please let me know your perspective, so we can finalize the agenda and distribute it. Thanks.

Wesley J. Carpenter

Deputy Director, EPA's Office of Human Resources

Tel. No.: 202-564-2019

Cell Phone: Ex. 6 - Personal Privacy

E-mail: carpenter.wesley@epa.gov

## **National Partnership Council Executive Board Meeting Agenda**

August 16, 2017

11:00 a.m.- 5:00 p.m.

Room WJC North 3330

### **Management Representatives**

Donna Vizian, Acting AA, OARM, Co-Chair  
John Reeder, Deputy Chief of Staff  
Howard Osborne, Assoc. CFO, OCFO  
Jerry Blancato, Director, OSI, ORD  
James McDonald, ARA, Region 6  
Nancy Lindsay, ARA, Region 10  
Linda Gray, Director, OHR, OARM  
Krysti Corbett, Director, LER, OHR  
Robert Coomber, LER, OHR

### **Union Representatives**

Mark Coryell, AFGE, Union Co-Chair  
John O'Grady, AFGE Council 238  
Diane Lynn, NTEU Chapter 280  
Lesley Mills, NAGE, Local R1-240  
Leah Oliver, NAIL, Local 9  
Silvia Saracco, AFGE, Local 3347  
Mark Sims, ESC, Local 20  
Brent Maier, NTEU National Rep.

11:00-11:15 a.m.	Opening Remarks, Introductions	Donna Vizian, Mark Coryell
11:15-11:45 a.m.	VERA/VSIP	B.J. Collins, Deputy Director OARM-RTP
11:45-12:15 p.m.	Fitness Centers	Robert Coomber
12:15-1:30 p.m.	Lunch	
1:30-2:30 p.m.	OEI Technology Discussion	Patrick Grimm, Deputy Director, OCAPPM, OEI
2:30-3:00 p.m.	Budget Overview <ul style="list-style-type: none"><li>• General Introduction</li><li>• Detailed Budget Explanation</li><li>• Questions</li></ul>	David Bloom, Acting CFO
3:00-3:15 p.m.	Break	
3:15-3:45 p.m.	Union Notice	Mark Coryell
3:45-4:45 p.m.	Open Discussion	
4:45-5:00 p.m.	Closing Remarks	Donna Vizian, Mark Coryell

Message

---

**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 6/18/2017 4:21:37 PM  
**To:** Showman, John [Showman.John@epa.gov]; Hardy, Michael [Hardy.Michael@epa.gov]; Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Subject:** OARM V/V

Hi .

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

**To:** Hardy, Michael[Hardy.Michael@epa.gov]; Hitchens, Lynnann[hitchens.lynnann@epa.gov];  
Cox, Andrew[Cox.Andrew@epa.gov]  
**From:** Westenberger, Andrea  
**Sent:** Thur 6/15/2017 8:15:04 PM  
**Subject:** RE: 6/20 OARM & OCFO Meeting with ARAs

Ok, so here is a quick outline:

## OARM

- VERA/VSIP (10-15 min) – Linda/Wes/Debbi
- Fitness Centers (10 min) – Bob Coomber?
- EAP (5 min) – OHR

- *Drug Free Workplace*

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

## OCFO

- Budget (5 min)
- PCA/PeoplePlus (20 min)

Thanks,

Andrea

**Andrea Westenberger**

Lead Region Coordinator for OCFO & OARM

EPA Region 10

1200 Sixth Avenue, OMP 21-I01

Seattle, WA 98101

(206) 553-6111 (office)

Ex. 6 - Personal Privacy (cell)

[westenberger.andrea@epa.gov](mailto:westenberger.andrea@epa.gov)

**From:** Hardy, Michael

**Sent:** Thursday, June 15, 2017 12:47 PM

**To:** Westenberger, Andrea <Westenberger.Andrea@epa.gov>; Hitchens, Lynnann <hitchens.lynnann@epa.gov>; Cox, Andrew <Cox.Andrew@epa.gov>

**Subject:** RE: 6/20 OARM & OCFO Meeting with ARAs

Andrea,

We have just received a request from OHR to add EAP and Drug Free Workplace to the agenda for next week. Thanks!

Michael Hardy

Acting Deputy Director, Office of Resources, Operations and Management

Office of Administration and Resources Management

US EPA

1200 Pennsylvania Avenue, NW

Washington, D.C. 20460

202-564-7899 - Work

Ex. 6 - Personal Privacy - Cell

**From:** Westenberger, Andrea  
**Sent:** Thursday, June 15, 2017 3:12 PM  
**To:** Hitchens, Lynnann <[hitchens.lynnann@epa.gov](mailto:hitchens.lynnann@epa.gov)>; Cox, Andrew <[Cox.Andrew@epa.gov](mailto:Cox.Andrew@epa.gov)>; Hardy, Michael <[Hardy.Michael@epa.gov](mailto:Hardy.Michael@epa.gov)>  
**Subject:** RE: 6/20 OARM & OCFO Meeting with ARAs

Ok, thanks. Fitness centers will probably come up too – we saw the heads up yesterday.

Thanks,

Andrea

**Andrea Westenberger**

Lead Region Coordinator for OCFO & OARM

EPA Region 10

1200 Sixth Avenue, OMP 21-I01

Seattle, WA 98101

(206) 553-6111 (office)

Ex. 6 - Personal Privacy (cell)

[westenberger.andrea@epa.gov](mailto:westenberger.andrea@epa.gov)

**From:** Hitchens, Lynnann  
**Sent:** Thursday, June 15, 2017 12:11 PM  
**To:** Westenberger, Andrea <[Westenberger.Andrea@epa.gov](mailto:Westenberger.Andrea@epa.gov)>; Cox, Andrew <[Cox.Andrew@epa.gov](mailto:Cox.Andrew@epa.gov)>; Hardy, Michael <[Hardy.Michael@epa.gov](mailto:Hardy.Michael@epa.gov)>  
**Subject:** RE: 6/20 OARM & OCFO Meeting with ARAs

Andrea – Michael is going to poll the offices for other topics. We'll make sure Linda/Wes or Debbi Hart is available for the V/V discussion – I imagine that will take 10-15 minutes, about



half the time.

Lynnnann Hitchens

Acting Director, Office of Resources, Operations and Management

Office of Administration and Resources Management

P: 202-564-3184

M: Ex. 6 - Personal Privacy

**From:** Westenberger, Andrea

**Sent:** Thursday, June 15, 2017 1:09 PM

**To:** Cox, Andrew <[Cox.Andrew@epa.gov](mailto:Cox.Andrew@epa.gov)>; Hitchens, Lynnnann <[hitchens.lynnann@epa.gov](mailto:hitchens.lynnann@epa.gov)>

**Subject:** RE: 6/20 OARM & OCFO Meeting with ARAs

Hi all – thanks for coordinating on this.

Lynnnann, for the OARM portion, the ARAs would like an update on VERA/VSIP communications

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process** Are there other OARM topics you're planning for the agenda?

Thanks,

Andrea

**Andrea Westenberger**

Lead Region Coordinator for OCFO & OARM

EPA Region 10

1200 Sixth Avenue, OMP 21-I01

Seattle, WA 98101

(206) 553-6111 (office)

Ex. 6 - Personal Privacy (cell)

[westenberger.andrea@epa.gov](mailto:westenberger.andrea@epa.gov)

**From:** Cox, Andrew

**Sent:** Wednesday, June 14, 2017 7:52 AM

**To:** Hitchens, Lynnann <[hitchens.lynnann@epa.gov](mailto:hitchens.lynnann@epa.gov)>

**Cc:** Westenberger, Andrea <[Westenberger.Andrea@epa.gov](mailto:Westenberger.Andrea@epa.gov)>

**Subject:** 6/20 OARM & OCFO Meeting with ARAs

Lynnann,

One detail I forgot to ask you about is whether OARM wanted to have your portion of the meeting from 11:30AM to 12PM EST or 12PM to 12:30PM EST. We'll work with whichever half hour you do not want.

---

Andrew B. Cox, MBA, PMP

U.S. EPA Office of the Chief Financial Officer (2710A)

Immediate Office

Policy and Communications Staff

1200 Pennsylvania Avenue, NW

Washington, DC 20460

(202)-564-4398

**To:** Patrick, Kimberly[Patrick.Kimberly@epa.gov]  
**Cc:** Hardy, Michael[Hardy.Michael@epa.gov]; Lemley, Lauren[Lemley.Lauren@epa.gov]  
**From:** Hitchens, Lynnann  
**Sent:** Thur 5/4/2017 9:04:07 PM  
**Subject:** phone call

Hi – I left you a voicemail. First thing was audits:

## Ex. 5 - Deliberative Process

The second item was about the VERA/VSIP. Lauren Lemley sent a table for your comment. Maybe we can get together with you and Pam next week to get some more details on what you would like to offer.

Thanks!

Lynnann Hitchens

Acting Director, Office of Resources, Operations and Management

Office of Administration and Resources Management

P: 202-564-3184

M: Ex. 6 - Personal Privacy

Message

---

**From:** Hardy, Michael [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=49C8348DCE4E4B8C890FF4C7D5E8F243-MICHAEL E. HARDY]  
**Sent:** 5/23/2017 1:45:27 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Subject:** RE: V/V Template

Lynnann,

I spoke with Monisha and she's fine with the numbers.

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work  
**Ex. 6 - Personal Privacy** - Cell

---

**From:** Hitchens, Lynnann  
**Sent:** Tuesday, May 23, 2017 9:32 AM  
**To:** Hardy, Michael <Hardy.Michael@epa.gov>  
**Subject:** FW: V/V Template

Lynnann Hitchens  
Acting Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
P: 202-564-3184  
M: **Ex. 6 - Personal Privacy**

---

**From:** Lemley, Lauren  
**Sent:** Monday, May 22, 2017 4:22 PM  
**To:** Hitchens, Lynnann <hitchens.lynnann@epa.gov>  
**Subject:** V/V Template

Here is a version with names and total offers on the second tab.

Lauren Lemley  
Office of Resources, Operations and Management, OARM  
202-564-1290

Message

---

**From:** Hardy, Michael [Hardy.Michael@epa.gov]  
**Sent:** 5/9/2017 2:56:07 PM  
**To:** Barber, Delores [barber.delores@epa.gov]  
**Subject:** Lunch

Delores,

I realize we're on for a TBD lunch today but I'm stuck on V/V fire drills. Can we reschedule?

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work  

Ex. 6 - Personal Privacy

 - Cell

Message

---

**From:** Hardy, Michael [Hardy.Michael@epa.gov]  
**Sent:** 4/28/2017 8:51:28 PM  
**To:** Lemley, Lauren [Lemley.Lauren@epa.gov]  
**CC:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Subject:** V/V

Lauren,

Did you receive the summaries from each Office?

Michael Hardy  
Acting Deputy Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
US EPA  
1200 Pennsylvania Avenue, NW  
Washington, D.C. 20460  
202-564-7899 - Work  
Ex. 6 - Personal Privacy - Cell

**From:** Hunt, Loretta  
**Location:** Teleconference  
**Importance:** Normal  
**Subject:** VERA/VSIP Planning and Updates  
**Start Date/Time:** Thur 7/6/2017 6:30:00 PM  
**End Date/Time:** Thur 7/6/2017 7:00:00 PM

Call-in: Ex. 6 - Personal Privacy

Conf. code: Ex. 6 - Personal Privacy

## Appointment

---

**From:** Hunt, Loretta [Hunt.Loretta@epa.gov]  
**Sent:** 5/18/2017 9:19:16 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]; Peabody, Hitch [Peabody.Hitch@epa.gov]; Parker, Gary [parker.gary@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]; Schulman, Marvin [Schulman.Marvin@epa.gov]; Hampton, Torrey [hampton.torrey@epa.gov]; McNeal, Detha [McNeal.Detha@epa.gov]  
**CC:** Barnett, Howard [Barnett.Howard@epa.gov]  
**Subject:** VERA/VSIP Overview  
**Attachments:** vera\_guide.pdf; vsip\_guide.pdf; Top 10 FAQs - VERA and VSIP.pdf; VERA- VSIP FAQ's Managers .pdf; VERA-VSIP Overview 5-22-17.pptx  
**Location:** WJC East 1422  
**Start:** 5/23/2017 2:00:00 PM  
**End:** 5/23/2017 3:30:00 PM  
**Show Time As:** Busy

Background materials and training slides



**From:** Westenberger, Andrea  
**Location:** Ex. 6 - Personal Privacy access code Ex. 6 - Personal Privacy  
**Importance:** Normal  
**Subject:** Updating guidance for V/V for regions  
**Start Date/Time:** Wed 5/10/2017 5:00:00 PM  
**End Date/Time:** Wed 5/10/2017 5:30:00 PM

→ [Join Skype Meeting](#)

## Ex. 5 - Deliberative Process

Lynnann – I see that you're not available so please share your notes/discuss with Debbi/Loretta beforehand if possible

Message

---

**From:** McNeal, Detha [McNeal.Detha@epa.gov]  
**Sent:** 7/20/2017 6:50:13 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Subject:** RE: VERA/VSIP Meeting

ok

---

**From:** Hart, Debbi  
**Sent:** Thursday, July 20, 2017 2:50 PM  
**To:** McNeal, Detha <McNeal.Detha@epa.gov>  
**Subject:** Re: VERA/VSIP Meeting

Great - thanks! I'm over in North at meeting now so maybe you could open call and see who plugs in and I'll try to connect ASAP.

Sent from my iPhone

On Jul 20, 2017, at 2:47 PM, McNeal, Detha <McNeal.Detha@epa.gov> wrote:

Oh, no problem. I have my own number. I haven't used it in a while hopefully it works. I'll check now and email the group if it does.

---

**From:** Hart, Debbi  
**Sent:** Thursday, July 20, 2017 2:47 PM  
**To:** McNeal, Detha <McNeal.Detha@epa.gov>  
**Subject:** Re: VERA/VSIP Meeting

Yikes- no! Can you get?

Sent from my iPhone

On Jul 20, 2017, at 2:45 PM, McNeal, Detha <McNeal.Detha@epa.gov> wrote:

Debbi,

Do you know Loretta's leader pin for the conference call today? If not, I'll need to send my conference number to the participants instead.

Detha McNeal  
Human Resources Specialist  
Policy and Accountability Branch  
Policy, Planning and Training Division  
Office of Human Resources  
U.S. EPA  
(202) 564-6707

**To:** Hunt, Loretta[Hunt.Loretta@epa.gov]; Bonner, Jerome[Bonner.Jerome@epa.gov]; Engebretson, Lizabeth[Engebretson.Lizabeth@epa.gov]; Taylor, Jeremy[Taylor.Jeremy@epa.gov]; Cunningham, Bisa[cunningham.bisa@epa.gov]; Corbett, Krysti[Corbett.Krysti@epa.gov]; Coomber, Robert[coomber.robert@epa.gov]; Schulman, Marvin[Schulman.Marvin@epa.gov]; McNeal, Detha[McNeal.Detha@epa.gov]; Peabody, Hitch[Peabody.Hitch@epa.gov]  
**Cc:** Mairose, Sue[Mairose.Sue@epa.gov]; Davis, Cathy[Davis.Cathy@epa.gov]; Jimenez, Elaine[Jimenez.Elaine@epa.gov]; Brown, Rohn[brown.rohn@epa.gov]; Atkinson, Ryan[Atkinson.Ryan@epa.gov]; Parker, Gary[parker.gary@epa.gov]; Burt, Cynthia[Burt.Cynthia@epa.gov]; Hampton, Torrey[hampton.torrey@epa.gov]  
**From:** Hart, Debbi  
**Sent:** Thur 6/29/2017 7:04:09 PM  
**Subject:** RE: VERA/VSIP Planning and Updates  
[SSC Schedule V-V June28 2017 .docx](#)

Here is the updated schedule for your review.

Debbi Hart  
Director

Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

-----Original Appointment-----

**From:** Hunt, Loretta  
**Sent:** Tuesday, June 06, 2017 5:20 PM  
**To:** Hunt, Loretta; Bonner, Jerome; Engebretson, Lizabeth; Taylor, Jeremy; Cunningham, Bisa; Hart, Debbi; Corbett, Krysti; Coomber, Robert; Schulman, Marvin; McNeal, Detha; Peabody, Hitch  
**Cc:** Mairose, Sue; Davis, Cathy; Jimenez, Elaine; Brown, Rohn; Atkinson, Ryan; Parker, Gary; Burt, Cynthia; Hampton, Torrey  
**Subject:** VERA/VSIP Planning and Updates  
**When:** Thursday, June 29, 2017 3:00 PM-4:00 PM (UTC-05:00) Eastern Time (US & Canada).  
**Where:** Teleconference

Call-in: Ex. 6 - Personal Privacy

Conf. code: Ex. 6 - Personal Privacy

Message

---

**From:** Hart, Debbi [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=62AFB40F2BF1484D933F2CE207EB20E7-HART, DEBRA]  
**Sent:** 6/13/2017 3:55:36 PM  
**To:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Subject:** FW: Vera VSIP

FYI- **Ex. 5 - Deliberative Process**

-----Original Message-----

From: Hart, Debbi  
Sent: Tuesday, June 13, 2017 9:42 AM  
To: Vizian, Donna <Vizian.Donna@epa.gov>  
Subject: RE: Vera VSIP

**Ex. 5 - Deliberative Process**

-----Original Message-----

From: Vizian, Donna  
Sent: Tuesday, June 13, 2017 9:33 AM  
To: Hart, Debbi <Hart.Debbi@epa.gov>  
Subject: FW: Vera VSIP

Do you know

-----Original Message-----

From: Walsh, Ed  
Sent: Tuesday, June 13, 2017 9:31 AM  
To: Vizian, Donna <Vizian.Donna@epa.gov>; Richardson, RobinH <Richardson.RobinH@epa.gov>  
Subject: Vera VSIP

Hi Donna/ Robin.

**Ex. 5 - Deliberative Process**

Thanks

Ed

Message

---

**From:** Hart, Debbi [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=62AFB40F2BF1484D933F2CE207EB20E7-HART, DEBRA]  
**Sent:** 5/26/2017 2:23:39 PM  
**To:** Arron Helm [Helm.Arron@epa.gov]; Carter, Rick [Carter.Rick@epa.gov]; Bonner, Jerome [Bonner.Jerome@epa.gov]; Taylor, Jeremy [Taylor.Jeremy@epa.gov]; Engebretson, Lizabeth [Engebretson.Lizabeth@epa.gov]  
**CC:** Collins, BJ (Collins.BJ@epa.gov) [Collins.BJ@epa.gov]; Scola, Jennifer [Scola.Jennifer@epa.gov]; Loretta Hunt [Hunt.Loretta@epa.gov]; Parker, Gary [parker.gary@epa.gov]; Coomber, Robert [coomber.robert@epa.gov]; Showman, John [Showman.John@epa.gov]; Vizian, Donna [Vizian.Donna@epa.gov]  
**Subject:** Draft V/V SSC Schedule  
**Attachments:** DraftSSC Schedule V-V May2017 .docx

Greetings All-

Please take a look at the attached draft schedule which was modified from previous rounds of V/V. Warning-- it is very compressed. For discussion at next week's V/V meeting. Debbi

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

---

**From:** Vizian, Donna  
**Sent:** Friday, May 26, 2017 9:38 AM  
**To:** Hart, Debbi <Hart.Debbi@epa.gov>; Showman, John <Showman.John@epa.gov>; Coomber, Robert <coomber.robert@epa.gov>  
**Cc:** Corbett, Krysti <Corbett.Krysti@epa.gov>; Parker, Gary <parker.gary@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>; Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>  
**Subject:** RE: SSC Schedule

Thanks Loretta and Debbi. Please send to SSCs

Message

---

**From:** Hart, Debbi [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=62AFB40F2BF1484D933F2CE207EB20E7-HART, DEBRA]  
**Sent:** 5/8/2017 5:07:10 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**CC:** Loretta Hunt [Hunt.Loretta@epa.gov]  
**Subject:** RE: call tomorrow

It's on my calendar from tomorrow from 12-12:30. I think Andrea already posed and received answers to most of these questions from Loretta last week. Wes/Linda should be included.

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

---

**From:** Hitchens, Lynnann  
**Sent:** Monday, May 08, 2017 12:10 PM  
**To:** Hart, Debbi <Hart.Debbi@epa.gov>  
**Subject:** call tomorrow

The Lead Region is pushing to have a call with us TOMORROW for the HROs and ARAs. Andrea may have talked to Loretta. Below is the first cut at questions (in the invite). Can you guys make it? Do I need to add Linda and Wes to this invite?

# Ex. 5 - Deliberative Process

Lynnann Hitchens  
Acting Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
P: 202-564-3184

M: Ex. 6 - Personal Privacy

Message

---

**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 7/7/2017 3:16:34 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]  
**Subject:** Re: EPA Final VERA/VSIP Request--email 1 of 3

You guys are awesome.

> On Jul 7, 2017, at 8:51 AM, Hart, Debbi <Hart.Debbi@epa.gov> wrote:

>  
> Greetings All-

> Thank you for your assistance with this effort. Ex. 5 - Deliberative Process  
Ex. 5 - Deliberative Process Please let us know if there are any questions.

Thanks again-- Debbi

>  
> Debbi Hart  
> Director  
> Policy, Planning & Training Division  
> OHR, OARM  
> USEPA  
> 202.564.2011  
> hart.debbi@epa.gov  
>  
> \*\*\*\*\*  
>  
> <EPA Signed Request for VERA VSIP July2017.pdf>

Message

---

**From:** Bonner, Jerome [Bonner.Jerome@epa.gov]  
**Sent:** 6/29/2017 8:27:04 PM  
**To:** Shepherd, Jackie [Shepherd.Jackie@epa.gov]  
**CC:** Taylor, Jeremy [Taylor.Jeremy@epa.gov]; Engebretson, Lizabeth [Engebretson.Lizabeth@epa.gov]; Hart, Debbi [Hart.Debbi@epa.gov]; Hunt, Loretta [Hunt.Loretta@epa.gov]  
**Subject:** RE: FFPS Down time

Jackie

Thanks! It did not appear we should have any issues with processing actions during the anticipated timelines.

Thanks for the quick reply!

**Jerome W. Bonner**  
**Environmental Protection Agency**  
**Office of Administration and Resources Management - Cincinnati**  
**Director, Human Resources**  
**Cincinnati Human Resources Shared Service Center**  
**Tel: 513.569.7950**  
**Mobile:** Ex. 6 - Personal Privacy

**CONFIDENTIALITY:** This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 U.S.C. 552a) and should be treated accordingly."

---

**From:** Shepherd, Jackie  
**Sent:** Thursday, June 29, 2017 3:50 PM  
**To:** Bonner, Jerome <Bonner.Jerome@epa.gov>  
**Cc:** Taylor, Jeremy <Taylor.Jeremy@epa.gov>; Engebretson, Lizabeth <Engebretson.Lizabeth@epa.gov>; Hart, Debbi <Hart.Debbi@epa.gov>; Hunt, Loretta <Hunt.Loretta@epa.gov>  
**Subject:** RE: FFPS Down time

Hello Mr. B:

Yes, see below and see attached processing schedules. Let me know if you need me to do some outreach to explore extra processing schedules for EPA.

August 10-13, 2017 (the system goes down at 12:00 PM EST on the 10th and these dates include a Saturday and Sunday)  
September 4<sup>th</sup> (holiday)



**Jackie Shepherd**

Office of Human Resources  
Information Technology Division  
Phone: 513-569-7815

Cell: Ex. 6 - Personal Privacy

Fax: 513-487-2551

First Wk of Pay Period: 6:30 AM – 4:00 PM daily, off Friday

Second Wk of Pay Period: 6:30 AM – 4:00 PM daily, 6:30 AM -3:00 PM Friday

---

**From:** Bonner, Jerome

**Sent:** Thursday, June 29, 2017 3:41 PM

**To:** Shepherd, Jackie <[Shepherd.Jackie@epa.gov](mailto:Shepherd.Jackie@epa.gov)>

**Cc:** Taylor, Jeremy <[Taylor.Jeremy@epa.gov](mailto:Taylor.Jeremy@epa.gov)>; Engebretson, Lizabeth <[Engebretson.Lizabeth@epa.gov](mailto:Engebretson.Lizabeth@epa.gov)>; Bonner, Jerome <[Bonner.Jerome@epa.gov](mailto:Bonner.Jerome@epa.gov)>; Hart, Debbi <[Hart.Debbi@epa.gov](mailto:Hart.Debbi@epa.gov)>; Hunt, Loretta <[Hunt.Loretta@epa.gov](mailto:Hunt.Loretta@epa.gov)>

**Subject:** FFPS Down time

Hi Jackie

Are there any scheduled FFPS down time "maintenance" during August and September 2017? I believe I have noticed down time around holidays.

I asking due to any potential downtime when processing VERA/VSIP retirement actions?

Thanks

JB

**Jerome W. Bonner**

**Environmental Protection Agency**

**Office of Administration and Resources Management - Cincinnati**

**Director, Human Resources**

**Cincinnati Human Resources Shared Service Center**

**Tel: 513-569-7950**

**Mobile:** Ex. 6 - Personal Privacy

**CONFIDENTIALITY:** This communication may contain privileged or other confidential information. If you are not the intended addressee, or believe you have received this communication in error, you may neither copy, disseminate, nor distribute it to anyone else or use it in any unauthorized manner; to do so is strictly prohibited and may be unlawful. If you receive this email by mistake, please advise the sender immediately by using the reply facility in your mail software and delete it from your computer. "Information in this message may be subject to the Privacy Act (5 USC 552a) and should be treated accordingly."

Message

---

**From:** Hunt, Loretta [Hunt.Loretta@epa.gov]  
**Sent:** 5/8/2017 5:16:58 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Subject:** RE: call tomorrow

Yes, I answered all of these questions but I guess the ARAs want it straight from our mouths.

Loretta L. Hunt  
Branch Chief  
Policy and Accountability Branch  
Policy, Planning and Training Division  
Office of Human Resources  
U.S. EPA  
Phone: (202) 564-6963  
Email: [hunt.loretta@epa.gov](mailto:hunt.loretta@epa.gov)

---

**From:** Hart, Debbi  
**Sent:** Monday, May 08, 2017 1:07 PM  
**To:** Hitchens, Lynnann <[hitchens.lynnann@epa.gov](mailto:hitchens.lynnann@epa.gov)>  
**Cc:** Hunt, Loretta <[Hunt.Loretta@epa.gov](mailto:Hunt.Loretta@epa.gov)>  
**Subject:** RE: call tomorrow

It's on my calendar from tomorrow from 12-12:30. I think Andrea already posed and received answers to most of these questions from Loretta last week. Wes/Linda should be included.

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

---

**From:** Hitchens, Lynnann  
**Sent:** Monday, May 08, 2017 12:10 PM  
**To:** Hart, Debbi <[Hart.Debbi@epa.gov](mailto:Hart.Debbi@epa.gov)>  
**Subject:** call tomorrow

The Lead Region is pushing to have a call with us TOMORROW for the HROs and ARAs. Andrea may have talked to Loretta. Below is the first cut at questions (in the invite). Can you guys make it? Do I need to add Linda and Wes to this invite?

## Ex. 5 - Deliberative Process

# Ex. 5 - Deliberative Process

Lynnann Hitchens

Acting Director, Office of Resources, Operations and Management

Office of Administration and Resources Management

P: 202-564-3184

M: **Ex. 6 - Personal Privacy**

## Appointment

---

**From:** Wiskerchen, Nicholas [Wiskerchen.Nicholas@epa.gov]  
**Sent:** 7/17/2017 3:50:03 PM  
**To:** Wiskerchen, Nicholas [Wiskerchen.Nicholas@epa.gov]; Hitchens, Lynnnann [hitchens.lynnann@epa.gov]  
**Subject:** VERA/VSIP Impact Discussion  
**Location:** Lynnnann Office  
**Start:** 7/17/2017 7:30:00 PM  
**End:** 7/17/2017 8:00:00 PM  
**Show Time As:** Busy

Lynnnann,

If you have time, it'd like to meet this afternoon to discuss the recent VERA/VSIP candidate pool announcement, and how it might affect our offices and OROM.

Thanks,

Nick

## Appointment

---

**From:** Hitchens, Lynnann [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=76CC2F6436CF45B89D2A09AB6F9FDFB5-HITCHENS, LYNNANN]  
**Sent:** 5/1/2017 3:53:17 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Lemley, Lauren [Lemley.Lauren@epa.gov]  
**Subject:** Discussion  
**Location:** Lauren to call Lynnann  
**Start:** 5/1/2017 5:00:00 PM  
**End:** 5/1/2017 5:30:00 PM  
**Show Time As:** Busy

Let's see where we stand with the VERA/VSIP materials. I haven't opened all the attachments yet – but I plan to do so over lunch.

# Ex. 5 - Deliberative Process

Message

---

**From:** Vizian, Donna [Vizian.Donna@epa.gov]  
**Sent:** 5/31/2017 8:54:04 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]  
**Subject:** Re: Seattle meeting

So I am on until 7:30 pm

On May 31, 2017, at 3:17 PM, Hitchens, Lynnann <[hitchens.lynnann@epa.gov](mailto:hitchens.lynnann@epa.gov)> wrote:

You are on the agenda for a VTC discussion on "Workforce Reshaping and VERA/VSIP"

Tuesday, 6/13 at 1:30 – 4:30 Pacific time.

Here is the agenda, if you want to know how they are spending time.....

Lynnann Hitchens  
Acting Director, Office of Resources, Operations and Management  
Office of Administration and Resources Management  
P: 202-564-3184  
M: Ex. 6 - Personal Privacy

<20170612-20170615 ARA Mtg in Seattle - Draft Outline v3 - ARA Review.docx>

Message

---

**From:** Lemley, Lauren [Lemley.Lauren@epa.gov]  
**Sent:** 4/26/2017 7:53:08 PM  
**To:** Hitchens, Lynnann [hitchens.lynnann@epa.gov]; Jablonski, Janice [jablonski.janice@epa.gov]  
**Subject:** Discussion Document  
**Attachments:** V-V Discussion Document 4.26.17.docx

Hi,

I have pulled together all of my notes from the meeting earlier into the attached draft document. I will update and clean this up once the offices send me their information on Friday.

Lauren Lemley  
Office of Resources, Operations and Management, OARM  
202-564-1290

Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 6/29/2017 5:47:07 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]  
**CC:** Parker, Gary [parker.gary@epa.gov]  
**Subject:** Updated schedule for you to add to 3:00 invite. THX!  
**Attachments:** SSC Schedule V-V June28 2017 .docx

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*



Message

---

**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 6/16/2017 2:35:16 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]  
**CC:** Parker, Gary [parker.gary@epa.gov]  
**Subject:** call when you're back so we can see where things stand for the VV--her is what we need--

# Ex. 5 - Deliberative Process

## Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process Gary is out today.

Debbi Hart  
Director  
Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

\*\*\*\*\*

Message

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**From:** Gantt, Melissa [Gantt.Melissa@epa.gov]  
**Sent:** 4/11/2017 2:09:41 PM  
**To:** Hart, Debbi [Hart.Debbi@epa.gov]; Cooper, Marian [Cooper.Marian@epa.gov]; Bell, Matthew [Bell.Matthew@epa.gov]  
**CC:** Hunt, Loretta [Hunt.Loretta@epa.gov]; Parker, Gary [parker.gary@epa.gov]  
**Subject:** RE: Workforce planning materials

Good Morning Ms. Hart

Thank you –

v/r

Melissa

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**From:** Hart, Debbi  
**Sent:** Tuesday, April 11, 2017 10:06 AM  
**To:** Cooper, Marian <Cooper.Marian@epa.gov>; Bell, Matthew <Bell.Matthew@epa.gov>; Gantt, Melissa <Gantt.Melissa@epa.gov>  
**Cc:** Hunt, Loretta <Hunt.Loretta@epa.gov>; Parker, Gary <parker.gary@epa.gov>  
**Subject:** FW: Workforce planning materials

FYI—for 11:00.

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**From:** Hart, Debbi  
**Sent:** Tuesday, April 11, 2017 8:00 AM  
**To:** Showman, John <Showman.John@epa.gov>; Vizian, Donna <Vizian.Donna@epa.gov>  
**Cc:** Carpenter, Wesley <Carpenter.Wesley@epa.gov>; Gray, Linda <gray.linda@epa.gov>  
**Subject:** Workforce planning materials

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

**Ex. 5 - Deliberative Process**

Thanks. Debbi

Debbi Hart  
Director

Policy, Planning & Training Division  
OHR, OARM  
USEPA  
202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

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Message

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**From:** Hart, Debbi [Hart.Debbi@epa.gov]  
**Sent:** 3/30/2017 8:56:16 PM  
**To:** Hunt, Loretta [Hunt.Loretta@epa.gov]  
**Subject:** FW: v1 VERA VISP material.docx  
**Attachments:** v1 VERA VISP material (002).docx

**Importance:** High

Can you take a look real quick look at my suggested edits on this one?

Debbi Hart  
Director  
Policy, Planning & Training Division  
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202.564.2011  
[hart.debbi@epa.gov](mailto:hart.debbi@epa.gov)

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**From:** Cooper, Marian  
**Sent:** Thursday, March 30, 2017 11:54 AM  
**To:** Hart, Debbi <Hart.Debbi@epa.gov>  
**Subject:** v1 VERA VISP material.docx

**To:** Showman, John[Showman.John@epa.gov]; Helm, Arron[Helm.Arron@epa.gov]; Vizian, Donna[Vizian.Donna@epa.gov]  
**Cc:** Hunt, Loretta[Hunt.Loretta@epa.gov]  
**From:** Hart, Debbi  
**Sent:** Tue 2/28/2017 8:51:21 PM  
**Subject:** V/V timeline and costs

Here you go. Let us know if there are questions.

## Ex. 5 - Deliberative Process

# Ex. 5 - Deliberative Process

## Considerations

# Ex. 5 - Deliberative Process

Debbi Hart  
Director

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**To:** Hunt, Loretta[Hunt.Loretta@epa.gov]  
**From:** Hart, Debbi  
**Sent:** Tue 2/28/2017 8:36:20 PM  
**Subject:** FW: Costs and assumptions

# Ex. 5 - Deliberative Process

Debbi Hart  
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**From:** Hunt, Loretta  
**Location:** WJC East 1422  
**Importance:** Normal  
**Subject:** VERA/VSIP Project  
**Start Date/Time:** Wed 4/26/2017 2:00:00 PM  
**End Date/Time:** Wed 4/26/2017 2:30:00 PM  
[vera\\_guide.pdf](#)  
[vsip\\_guide.pdf](#)

Please review the guides and video prior to the meeting. Thanks.

<https://www.youtube.com/watch?v=TFH3OrQCvwk>

Conf. Ex. 6 - Personal Privacy

Code: Ex. 6 - Personal Privacy

**From:** Hunt, Loretta  
**Location:** Teleconference  
**Importance:** Normal  
**Subject:** VERA/VSIP Planning  
**Start Date/Time:** Wed 5/31/2017 7:00:00 PM  
**End Date/Time:** Wed 5/31/2017 8:00:00 PM

Call-in: Ex. 6 - Personal Privacy

Conf. code: Ex. 6 - Personal Privacy

Agenda

## Ex. 5 - Deliberative Process

Message

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**From:** Showman, John [/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=4A5D6E83FBF5499E93CC6B41090245B2-JSHOWMAN]  
**Sent:** 4/27/2017 1:01:40 PM  
**To:** Shaw, Betsy [Shaw.Betsy@epa.gov]  
**Subject:** RE: Is there a deputies meeting today?

Yes --- I forwarded the meeting invite from my calendar to you .... Haven't seen any agenda yet

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

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**From:** Shaw, Betsy  
**Sent:** Thursday, April 27, 2017 8:56 AM  
**To:** Showman, John <Showman.John@epa.gov>  
**Subject:** RE: Is there a deputies meeting today?

Noon?

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**From:** Showman, John  
**Sent:** Thursday, April 27, 2017 8:56 AM  
**To:** Shaw, Betsy <Shaw.Betsy@epa.gov>; Osborne, Howard <Osborne.Howard@epa.gov>  
**Subject:** RE: Is there a deputies meeting today?

It's the joint DAA/DRA meeting – in my conference room at noon.

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**From:** Shaw, Betsy  
**Sent:** Thursday, April 27, 2017 8:52 AM  
**To:** Showman, John <Showman.John@epa.gov>; Osborne, Howard <Osborne.Howard@epa.gov>  
**Subject:** Is there a deputies meeting today?

Hi John and Howard,

I thought I had seen a deputies meeting on my calendar today but it's no longer there. I fear it may have been accidentally deleted. Let me know if we're on, and if so, where and when.

Many thanks,

Betsy